

Gender Equality Indicators: Public Concerns and Public Policies

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Gender Equality Indicators: Public Concerns and Public Policies

Proceedings of a symposium held at
Statistics Canada, March 26 and 27, 1998

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This document expresses the views and opinions of the authors and does not necessarily represent the official policy or opinion of the sponsoring federal departments or the Government of Canada.

Canadian Cataloguing in Publication Data

Gender equality indicators: public concerns and public policies: proceedings of a symposium held at Statistics Canada, March 26 and 27, 1998

Issued also in French under title : Les indicateurs de l'égalité entre les sexes, préoccupations publiques et politiques gouvernementales.

Issued also in electronic format through the Internet computer network.

Co-published by Health Canada, Statistics Canada and Human Resources Development Canada.

ISBN 0-662-27418-0

Cat. No. SW21-36/1998E

1. Women – Canada – Economic conditions – Congresses.

2. Women – Canada – Social conditions – Congresses.

3. Economic indicators – Canada – Congresses.

I. Stone, Leroy O., 1936-

II. Karman, Zeynep E.

III. Yaremko, W. Pamela.

IV. Canada, Status of Women Canada.

V. Canada, Health Canada.

VI. Canada, Statistics Canada.

VII. Canada, Human Resources Development Canada.

HQ1236.5C3G46 1998

305.4'0971

C98-980386-4

Published by authority of Status of Women Canada

These proceedings may be reproduced wholly, or in part, provided attribution is given.

La version française de cette publication est disponible sur demande (n° SW21-36/1998F au catalogue).

January 1999

Catalogue no. SW21-36/1998E

ISBN 0-662-27418-0

Ottawa

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Foreword

Message from

The Honourable Hedy Fry

Secretary of State (Multiculturalism) (Status of Women)

The Gender Equality Indicators Symposium provided a precedent-setting opportunity for those working in the social indicators field to focus on gender, and share their experiences on incorporating women's realities in the measurement of social and economic well-being. The range of participants from across Canada and around the world reflected the global significance of gender equality indicators, and the degree to which interest in their development is growing on a national and international scale.

Gender equality indicators are not just about measuring the differences between women and men. They are powerful tools with which we can understand better how we live our lives, how we raise our families, how we work. Importantly, they are a critical factor in how women and men spend their time – a valuable commodity in an increasingly complex world, where the development of all of Canada's human resources is critical to our future success.

The importance of gender equality indicators as benchmarks in our progress toward equality is indeed profound. As such, they are critical to my mission as Secretary of State for Status of Women Canada. But as tools that measure the distribution of the factors that determine the quality of our lives – time, work and income – their importance to society as a whole cannot be underestimated.

From child poverty to the impact of new technologies, we are facing increasingly complex challenges on every front. It is my belief that gender equality indicators will provide us with information we need to effectively manage our changing world. Importantly, they will help us to ensure that as many Canadians as possible are participating, benefiting and contributing to our social and economic success in the 21st century.

Finally, this symposium would not have been possible without the rich and varied contributions of our partners. I wish to extend a special thanks to Statistics Canada for initiating and organizing the symposium. My department, Status of Women Canada, was pleased to co-sponsor the

event, along with Human Resources Development Canada (in particular, its Women's Bureau) and Health Canada. The symposium marks an important step in advancing the work originating in the publication, *Economic Gender Equality Indicators*, a joint project undertaken by Federal, Provincial/Territorial Ministers Responsible for the Status of Women. I would also like to acknowledge the participation of non-governmental organizations and their contribution to the symposium's success.

Preface

The publication in October 1997 of *Economic Gender Equality Indicators* by the Federal, Provincial/Territorial Ministers Responsible for the Status of Women was the key stimulus for the symposium that gave rise to this document. Three months after that event we began to discuss ways of designing a process to examine nation-wide usage of the information contained in that document. The symposium was a part of this process.

However, if it was to be a worthwhile event, the symposium needed to define a selection of important issues that go far beyond those directly connected with examining the usage of *Economic Gender Equality Indicators*. We selected four broad themes around which to focus the workshops. These themes were as follows:

- I. Gender equality indicators and gender-based analysis
- II. Paradigms implicit in social and economic indicators
- III. “Best practices” for developing, dissemination, and using gender equality indicators (GEI)
- IV. Technical problems and data gaps confronting GEI development.

This book contains the speeches and the background papers that were designed to highlight the four themes, as well as summaries of the outcomes of discussion in the related workshops. To these communications are added the welcoming speeches by leaders of the sponsoring departments, and major addresses by leaders of two related bureaus with wide international reputations – the Gender Statistics Division of Statistics Sweden, and the Human Development Report Office of the United Nations.

Leaders from government, university and non-government organizations participated actively in the workshops. They contributed to the achievement of a high level of intellectual stimulation in connection with important and complex issues. The list of participants at the end of the book demonstrates that all the major regions of Canada were represented at the symposium by leaders of these organizations.

To all of the persons cited indirectly above, and to other contributing participants, we wish to express our sincere thanks. Special thanks are due to individuals who worked hard and successfully over a period of many weeks to help create and manage the event. They include, in alphabetical order, Michael McCracken, Bonnie O'Neil-Small, Jean Randhawa and Sheila Regehr. Finally, for their work both in support of the symposium and in the design of this book, special thanks are due to Catherine Pelletier and Sharron Smith.

Leroy O. Stone
Zeynep E. Karman
Pamela Yaremko

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Importance of Gender Equality Indicators to the Business of Government

Notes for an address

by

The Honourable Hedy Fry

Secretary of State (Multiculturalism) (Status of Women)

Good morning.

It is my great pleasure to join you here today. This symposium marks an important milestone in our quest for women's equality and in our efforts to secure the well being of Canada's social and economic future.

We are meeting to acknowledge the contribution that gender equality indicators make to a growing body of knowledge about women and men, social and economic relationships, growth and human development. Importantly, we think that these indicators are responding to a need for innovation in a changing world.

As I look around the room, I see many champions of this critical work, and I want to thank you for coming; because you are the leaders who have probed beyond accepted standards to help shape a new understanding of our socio-economic reality. We have always talked about social issues and economic issues as distinct and separate structures. A lot of the work that has been done over the last few years has shown us that the distinctions between social and economic issues are arbitrary, and they are very artificial. Social and economic issues are very interdependent.

In particular, I would like to thank Statistics Canada for initiating and organizing the symposium. Many thanks as well to Human Resources Development Canada, Health Canada and my department, Status of Women Canada, for co-sponsoring the event. The support of Chief Statistician Dr. Ivan Fellegi and Dr. Leroy Stone of Statistics Canada's Analytical Studies Branch, has been pivotal in advancing the awareness and development of gender equality indicators.

I would also like to acknowledge my provincial and territorial counterparts, who have moved forward strongly and have believed in these issues from the beginning. Federal-Provincial/Territorial Ministers

Responsible for the Status of Women jointly initiated the *Economic Gender Equality Indicators*, a significant contribution to the social indicators field. I do not know how many of you have a copy of our document, which was assisted by Statistics Canada.

The importance of gender equality indicators to the business of government and non-government organizations, and the private sector, is clear. They are benchmarks to guide us in undertaking gender-based analysis of policies and programs. A commitment to gender-based analysis has been made by countries around the world and by my government. It is outlined in the 1995 report *Setting the Stage for the Next Century: Federal Plan for Gender Equality*.

A great deal of credit is due to the groups of women of the non-governmental organizations who have constantly told us that it was important that we have this information.

A great deal of credit is due to the groups of women of the non-governmental organizations who have constantly told us that it was important that we have this information. They have been instrumental in raising awareness of the range of contributions that women make to society and the economy. The inclusion of questions on unpaid work in the 1996 Census for example, was due, in large part, to their unwavering belief in the need for policy-makers to have and use this information.

The progress made in the measurement of unpaid work in Canada is integral to the development of gender equality indicators. Valuing both paid and unpaid work is not only a key element of women's economic autonomy, but of the well being of the family and society as a whole. The information that we have from the census about unpaid work, under the three headings of housework, taking care of children, and taking care of seniors, is very informative. This information reflected the work that we had done over the two years in our Economic Gender Indicators.

Since the 1970s, Canada has been recognized as a leader in the measurement and valuation of unpaid work. As many of you are aware, the results of the questions on unpaid work contained in the 1996 Census were released just last week. These questions, and the realities that their answers reveal, are a critical step towards ensuring that caregiving is counted. But what are we doing to make sure that it is valued, supported and more equitably shared?

We know, for instance, that, as we see in the census, that many women have been engaged, and many men as well, but mostly women, have been engaged in dealing with the issue of unpaid work, which includes giving care for seniors and for children. If this was not being done in the unpaid work sector, somewhere along the way governments would have had to

have policies to deal with this in the public paid work sector. So we see the unpaid work has saved money for the government and has in fact contributed to the gross domestic product.

In Canada we are looking at issues such as those related to closing down of acute care beds, because we are trying to move towards appropriate home care and community care where possible. We know, however, that as women are moving into the paid work force there is a vacuum to be filled. The pressure on the need for someone to do that home care or that elder care is increasing. That pressure is due not only to funding issues but also to human resource issues, as women are leaving this area to go out into the paid work force.

If we are going to move women into the paid work force we need to be able to bridge that gap, to fill that need in society. Maternity and parental benefits are examples, as are flexible workplace policies and a range of child benefits. The most recent federal policy response was the tax credit for providers of care to elderly or disabled persons in last month's Federal Budget. As you know, the Minister of Finance created a tax credit of \$400 per year for persons who stayed at home to contribute in the unpaid work force to looking after elders or disabled persons. This is a start, an acknowledgment that one needs to recognize that work; because if you look down the road to the fact that at the end of their lives women who stay at home and do unpaid work have no pension benefits, have had no money for themselves to put into registered retirement savings plans, they have no private pension plans at all. These are the women who are solely and completely dependent upon government to support them when they are retired, and the pressure on government is still there. It is not as if because you do not recognize the unpaid work today you can get away with something later on. Government is then responsible for some sort of seniors retirement benefit, and I think you will find that you will pay more at the end of life than if you give it during life so that women can have this money set aside for their own pension benefits.

Researchers, non-government organizations and other experts have identified dependent care as the most critical and urgent unpaid work issue of public policy interest. Clearly, this government is listening and I am proud of our achievements. I am also aware that we have a long way to go.

This symposium provides a needed contribution to informed public dialogue and policy development in the interest of gender equality. We have gathered here because the time has come to go beyond the data and

Researchers, non-government organizations and other experts have identified dependent care as the most critical and urgent unpaid work issue of public policy interest.

discover where it can take us. Why are these indicators of value? Why do the gaps that they identify exist and which policy directions are likely to be the most effective in helping to close them, recognizing that there is no 'one size fits all' policy? And what are the wider policy implications?

While gender equality is a critical objective in its own right, it is also a necessary condition to addressing other challenges.

While gender equality is a critical objective in its own right, it is also a necessary condition to addressing other challenges. If women, as they do in Canada, make up 51% of our work force, I know of no private company or no corporation that would develop its human resource potential and leave 51% untouched. If in Canada, or in any country of the world where we are looking at competitiveness, and we are concerned with developing our human resources to their utmost, then we are going to have to stop ignoring the 51% of women that have in many ways been ignored or where we have not really understood why some of the barriers have existed and why there has been a differential. Thus, challenges such as the reduction of poverty, environmental sustainability, and an equitable distribution of work, employment and resources are key.

From health and social service reforms to a renewed retirement income system, from changing paid labour force conditions to tax reform – this information has significant impact on effective policy development at all levels of government, as well as in the private and volunteer sectors.

Gender equality indicators are departures from accepted standards, an integration of social and economic policy, and a balance of male and female realities. If legislation and policies are going to be truly implementable, if they are really going to make a difference to the people whose lives one is trying to affect, it must first and foremost recognize the realities of peoples' lives, and recognize that different strategies have to be employed if you are going to achieve true equality. In order that our policies remain comprehensive and they touch on those realities that we are measuring, it is imperative that we continue to follow through with timely data. Data does not remain static. We must remember, therefore, that collection of data is a work in progress.

As well, all indicators, be they social or economic, are by their nature subjective. They are products of our conscious selves, reflecting certain patterns of thought. What we think. What is important. What we value. What counts. Are we sure, then, that gender equality indicators are measuring the right things and if so, as defined by whom?

Another challenge you face at this symposium arises out of the opportunity for exchange that it provides. In learning of the exciting

initiatives taking place across the country and around the world, you will also be asking yourselves how to optimize progress by working better together.

In discovering best practices, are there significant economies of scale yet to be realized? In analyzing what has worked and what hasn't, can we improve our development, dissemination and use of these valuable tools?

While gender equality indicators can enhance the efforts of governments undertaking gender-based analysis, they can also encourage those who have not yet begun. And how can we maximize their impact still further? Can they be used by businesses, by community organizations and by women and men making personal decisions in their lives about their future and that of their family? About whether they work or they do not work?

Finally, once we articulate our goals, how can these indicators help us develop concrete objectives and measure our success in achieving them?

We must be diligent in our efforts to raise awareness in all sectors of society on the value of this information. We can also provide guidance in finding, analyzing and interpreting the data so that appropriate and effective policy responses can be developed.

We must be diligent in our efforts to raise awareness in all sectors of society on the value of this information.

In this respect, I am pleased to announce the release today of a publication prepared by Statistics Canada for my department, Status of Women Canada, and it is called *Finding Data on Women: A Guide to Major Sources at Statistics Canada*. It is my sincere hope that women's groups, researchers, policy analysts and decision-makers, community organizations, advocacy groups and other interested women and men will find, in this Guide, a helpful starting point for their work. This Guide is really giving you the list of the information that is present. It is really important that we get the data, we know what data exist, and we know where are the gaps, and we know how we can continue to move forward to develop new data.

Towards the end of her life, the noted French feminist Simone de Beauvoir said in her book, *All Said and Done*, "I tore myself away from the safe comfort of certainties through my love for truth; and truth rewarded me."

The full truth may always allude us, but the important work that has brought us here today has at least enhanced our perception of it. The time has come to complete the picture of our economy and our society, to recall that in that picture we must fill in the 51% that we have left out.

Indeed, I have more questions than answers, and it means that we must continue to build on what we now know. This is a work in progress as I said earlier; but as society changes, as families change, as we find that people, especially women, live longer years, we need to remember that this is going to influence how we make public policy. We must continue to push that envelope to find out the newest data. We find that in the data we have, we must remember that there is not only the difference between men and women and the realities of their lives and the barriers that they face in terms of gender; but also among women there are many diversities. There is an issue to look at in Canada of aboriginal women, of lesbian women, of disabled women, of women of colour, because of the diversity of our population. The barriers that we find will, in fact, be different as we move forward and we disaggregate that data even further. But I believe the path before us is clear; because if equality in this society is what we are looking for, if we want to give everyone the opportunity to be able to achieve whatever is their potential, then we must find that information that reflects the realities and the different barriers that people face.

Thus we must continue, all of us in this room, to increase awareness and acceptance of women's realities and their values. We can make visible what has before been hidden and unrecognized with good data. In so doing, we can build one further, vital step toward equality between women and men and amongst women, and we can secure the foundation for our future as a nation.

I am inspired by the wealth and diversity of knowledge I know is in this room. I believe that you are up to the challenge. I am certain there will be many engaging exchanges over the next two days and I look forward to learning of their outcome.

Thank you.

Gender Equality Indicators: Tools to Improve Policy Development and Program Design

Notes for an address

by
Mel Cappe
Deputy Minister
Human Resources Development Canada

I am very pleased to be here with you to discuss some of the key issues relating to gender equality, and to discuss initiatives to incorporate the analysis of indicators mentioned by the Minister into the policy and program development process. It is very important to integrate the gender equality indicators, and I would like to come back to this point in a moment.

As Deputy Minister of one of the large federal government departments, I am convinced that these measures have an impact on the overall Canadian population – and not just on women. However, it is important to realize that incorporating these indicators into policy development will change policies and programs. I have just come from a meeting where employment insurance was discussed, and I am currently preparing a “DECK” for my Deputy Minister colleagues and soon for the Ministers as well. Someone in the room mentioned that of all the graphics and charts we had, there were none explaining the difference between the unemployment rates for men and for women, or the trends in the fluctuation of these figures. I’m sorry I forgot the figures, but I am proud to work in a department where this is a key issue, and where it was therefore acceptable for someone to raise this question and change the presentation to ensure that these trends would be shown to the Ministers at the upcoming Cabinet meeting.

I would now like to talk about my department and explain to you why this issue is important at HRDC.

Every Canadian, at some stage in life, receives support from Human Resources Development Canada (HRDC). Our department touches the lives of more than 6.9 million Canadians each year. But at some point everybody is really touched.

HRDC's services include the National Child Benefit. In collaboration with the provinces, this initiative deals with low-income families. It provides a tax benefit to low income families, and tries to help, in collaboration with the provinces, those parents to get back into the labour force, to become self-sufficient and get over the welfare wall. This initiative touches women much more than it does men, and many lone parent men and women. Analysis has been done on several occasions to determine how the National Child Benefit has a differential effect on men and women, and the importance that that makes in our design. We also have student loans and programming for youth at risk, as well as employment and training opportunities for individuals with disabilities. Our program ranges through the provision of Employment Insurance benefits for the unemployed, to regulating the work place in the federally regulated sector, to labour market training and finally to pensions for seniors.

Gender considerations permeate the entire life cycle and, consequently, must be considered when we develop policies or design programs within the department.

As Minister Fry pointed out, the life cycle is critical in looking at the differential ways that government policies and programs affect individuals, and the differential ways they affect men and women. Gender considerations permeate the entire life cycle and, consequently, must be considered when we develop policies or design programs within the department.

As the Federal-Provincial/Territorial Ministers Responsible for the Status of Women pointed out in their ground-breaking report, *Economic Gender Equality Indicators*,

"Gender equality requires appropriate treatment of both similarities and differences between women and men to achieve equal results . . . This requires equal valuation of the ways in which women and men are different as well as similar, respecting their rights and choices as full human beings and promoting a greater overall sharing of society's costs and benefits."

That really does capture the importance not only of just looking at equality focussing on similarities but rather equality exploiting the differences and understanding how that affects equality or inequality.

In our work at HRDC, we acknowledge that gender equality indicators, or GEIs, give us a better understanding of the social and economic contexts of various groups in the Canadian population, and how our policies and programs interact with them.

As well, we recognize that gender-based analysis must begin at the very earliest stages of policy and program development, because mistakes made at the outset cannot easily be remedied and unintended and potentially counter-productive consequences can arise. Indeed as we work through the Canada Pension Plan amendments that were most recently passed and implemented in C2 in this current parliament, the gender implications of pension policy are quite significant. There are not many easy answers, but there are many difficult questions and challenges. Taking account of them at the outset is essential to ensure that we get the right policy conclusion.

We recognize that gender-based analysis must begin at the very earliest stages of policy and program development.

The social, intellectual and health development of children is another example. We are in the very early stages of defining and measuring the learning readiness of children using the National Longitudinal Survey of Children and Youth.

For those of you unfamiliar with this project, this national survey co-sponsored by HRDC and Statistics Canada takes 25,000 children and follows them through time, providing an invaluable snapshot of the state of Canadian children. It charts their health, development, behaviour, self-image, relationships, child care, school achievement and participation in community life.

Over time, this national database will allow us to identify the factors that influence children's growth and development as they move from infancy to adulthood. It will help determine the prevalence of various biological, social and economic risk factors affecting children and youth, particularly those that impact children's readiness to learn.

Research indicates that the factors affecting learning readiness include physical well being and appropriate motor development, emotional health and a positive approach to new experiences, socialization, social skills, and other factors.

However, we are a long way from knowing the pathways that male and female children take to acquire those competencies. If there are marked differences, and if they are not adequately addressed at the earliest stages, there may be ramifications for all of our later programming geared to youth and adults.

Another example of the importance of indicators is the Index of Social Health, developed by HRDC for all of Canada. Over the past fifteen years, this measure of social well-being shows a different trend from economic well-being as measured by the GDP. But do men and women experience social well-being in the same way? The answer is no.

When we are confident of a measure of social well-being, it will be important to identify the different ways in which men and women contribute to the indicators that make up such a measure. In light of realities such as the fact that boys are much more likely than girls to successfully commit suicide while depression is more prevalent among teenaged girls, are examples of things we have to consider to make the distinction and understand the difference between men's social health and women's social health.

Further work on measures of well-being should examine the experience of social well-being from the point of view of both male and female life experience.

Further work on measures of well-being should examine the experience of social well-being from the point of view of both male and female life experience. Incorporating gender considerations into the index may shed new light on this important issue. In fact, indicators can prompt us to consider if we are even asking the right questions.

Measures such as the GEIs are also useful in determining the outcomes of program interventions. At HRDC, we are increasingly interested in evaluating outcomes in the broadest sense – the effect of the interventions on the quality of life. This is necessarily causing us to assess the way we collect program data and perform evaluations. I hope that your discussions at this conference will help us to ask the right questions.

Clearly, there are nuances to gender issues which require greater examination before we can develop appropriate policies and responsive programs. And that's the real value of economic gender equality indicators.

They allow us to identify gender trends that we may have previously missed or dealt with incorrectly by perpetuating gender stereotypes. Not only does this help us better target our initiatives, it also enables us to conduct more in-depth studies in areas requiring further attention.

The GEI's are an essential part of gender-based analysis which remind us to question whether both men's and women's experiences have been considered in identifying the issues, and how the outcomes of a given policy may be different for girls and boys, or women and men.

This analysis compels us to ask and re-ask certain questions. How is diversity taken into account? Do the options we are considering perhaps inadvertently run the risk of favouring or penalizing a given group? How do we achieve a better balance? We have to look at these questions and try to find answers.

Gender-based indicators and gender-based analysis make good public policy. They provide invaluable new tools to policy makers and program designers as we strive to uphold our constitutional obligation of ensuring fairness and equality for all Canadians. In keeping with this approach, HRDC has produced a backgrounder and guide to GBA which draws upon the groundbreaking work of Status of Women Canada and the work of provincial governments. I am hoping these documents will assist HRDC officials, but also officials in other departments, to do sounder and more comprehensive assessments of the impacts of their policies and programs.

Gender-based indicators and gender-based analysis make good public policy.

The integrative approach I have outlined is, of course, just one of many perspectives on the issue. Representatives from international agencies, the provinces, municipalities and women's organizations will each bring forward different experiences and expertise for consideration over the next two days.

This diversity of viewpoints is invaluable. Not only does it ensure inclusiveness. It also expands our knowledge base about the best ways to utilize gender equality indicators as we address the dynamics of gender differences at the front-end of policy and program development. If I have a regret about this conference, it is that there aren't more men participating. I congratulate the men who are participating; because I think it is important that the diversity of views informs this kind of discussion and inform the debate.

I thank you for the opportunity to contribute to this, and I wish you a very successful conference on what is obviously a very stimulating subject.

Contributions of Statistics Canada to Gender Sensitive Data and Analyses

Notes for an address

by
Ivan Fellegi
Chief Statistician
Statistics Canada

I welcome you all to Statistics Canada, particularly those of you who have come from other countries and others who may be visiting us for the first time. I am impressed and somewhat overwhelmed by the presence here of so many outstanding experts in a variety of domains related to gender equity. This creates a potential for discussions that will be profound and influential, and Statistics Canada is honoured to be the venue for your workshops.

Once again, the profile of social policies is rising among the concerns of Canadian governments. The aftermath of the prosperity of the 1980s, the recession of the early 1990s, long stagnant personal incomes, persistent unemployment, and the recent battles with the deficit have left us facing some fundamental questions about social cohesion and the distribution of opportunities to build self-reliance in Canadian society.

Not the least among these issues is the quest to achieve better gender balance across a variety of spheres of life. What is at stake here is not just equity, but, as has been clearly demonstrated by research, also economic development and the well-being of children.

And we have an additional complication. Cut-backs to the formal health care system are increasing the family's share in the burdens of caring for the sick; and that share falls disproportionately on the shoulders of women.

Hence it is important that gender balance be studied across a wide spectrum of the work that needs to be done in our society. A necessary condition for carrying on this kind of study effectively is a degree of leadership by the national statistical agency. Such leadership is obviously needed for the development of the necessary data bases, but it does not stop there. It encompasses analytic work leading to better insights which,

It is important that gender balance be studied across a wide spectrum of the work that needs to be done in our society.

There are difficult conceptual issues which have to be addressed (e.g., the valuation of unpaid work), and further leadership is required to communicate to the public analytically valid insights.

in turn, play a critical role in securing financial and moral support for the development of the needed data bases. In addition, there are difficult conceptual issues which have to be addressed (e.g., the valuation of unpaid work), and further leadership is required to communicate to the public analytically valid insights. When I look back on Canada's performance against these needs, we can all take some pride, I believe.

And I will go through some of the milestones just to illustrate some of the richness of the material that is released in the book today. But what I really want to emphasize, and this is what adds true strength and hope for further progress in the future, is the partnership which resulted in those accomplishments. There has been an exceptionally strong partnership between Status of Women Canada, Human Resource Development Canada, Health Canada, Statistics Canada, as leaders in the field who, in particular domains, have been strongly supported by Justice, Solicitor General, Heritage Canada, Provincial counterpart agencies and ministries, and still others.

- In the early 1970s, we were among the first countries to tackle the problem of attributing monetary values to different forms of unpaid work. Indeed some of the basic concepts now internationally accepted in this work, such as the third party criterion for identifying work of economic value, are derived from conceptual innovations made at Statistics Canada in the 1970s.
- In 1978 we published our first estimates of the value of household work in Canada.
- In 1981 we began to experiment with time use questionnaires in a survey of the populations of selected metropolitan areas.
- In 1986 we did our first national time use survey.
- In 1992 we did our second national time use survey, and did our third update of estimates of the value of household work in Canada.
- In April 1993 we co-sponsored, with Status of Women Canada, an international conference on the measurement and valuation of unpaid work.
- In 1993, with strong support from HRDC, we launched the Survey of Labour and Income Dynamics (SLID). SLID is a longitudinal survey. The same sample of persons is being followed for several years. This will allow analysts to track changes in their family composition, labour market activities, earnings and family income over time. With SLID, analysts can enter a new dimension of gender-

sensitive inquiry involving interactions between the family and the labour market. For example, they can begin to answer such questions as how earnings and career advancement are affected by spells of leave related to caring for children or the elderly.

- Mel already spoke about my favourite survey: The National Longitudinal Survey of Children and Youth.
- In 1993, with strong support from Health Canada, we carried out the ground-breaking national survey on Violence Against Women and we are continuing to work with federal and provincial departments of justice to develop reliable measures of all forms of family violence as part of the Government's Family Violence Initiative.
- In 1994 we completed the design of the Total Work Accounts System (TWAS). TWAS provides a foundation for studying a wide variety of issues where both paid and unpaid work need to be considered. TWAS marries concepts and data structures in such a way that a carefully constructed set of macro-level concepts is superimposed upon a base of microdata files. That base allows us to conduct simulations of the impact of alternative policy scenarios.
- In 1995 we published a historical series, going back to 1961, of valuations of different kinds of unpaid work. We estimated that, in 1992, the aggregate value of unpaid work was equivalent to one-third to one-half of GDP in 1992 (depending on the method of valuation).
- In 1996 the Census asked Canadians to report upon their time spent doing child care, elder care and household maintenance and the first results based on these data were released last week.
- In 1998 we are doing our third national time use survey.

In addition to these specific events, we have carried out other programs and also published many results of gender-sensitive analyses that are highly relevant to deliberations concerning gender issues. The publications which take into account these results are conceived in a way to render the data and objective analyses in an accessible form to the public. This work includes compendia such as *Women in Canada*, and many articles in *Canadian Social Trends*, *Perspectives on Labour and Income*, and *Education Quarterly*. The information published in these works has, in all cases, been widely recaptured by the media.

The importance of these steps for the concerns that you will be discussing today and tomorrow can scarcely be overstated. In a nutshell, there is no practical possibility of organizing institutional initiatives concerning gender balance without documentation of women's overwhelming presence in vital aspects of paid as well as unpaid work.

If together we had not taken the steps that I have outlined, we would today be in the dark ages for any effort to get serious public and institutional attention to the issues that you will be deliberating today and tomorrow. I take note, with pleasure, of the fact that the book recently released by the Federal-Provincial/Territorial Ministers and entitled *Economic Gender Equality Indicators* contains a large block of information drawn from our Total Work Accounts System which, in turn, draws on many of the surveys and data bases developed by Statistics Canada.

However, we cannot rest on our laurels because, as I mentioned at the beginning, there are new and continuing challenges that still have to be faced. We are determined to stay alert to the further improvements that will be needed in order to continue to play our part in illuminating the issues and tracking the effectiveness of policies. This will require continuing research and analysis to identify the main forces at work, an on-going adaptation of statistical programs, the initiation of new programs of both data collection and analysis. We are ready to pledge our commitment to continue to broaden and deepen our understanding in this area and to communicate our findings objectively and accessibly to the public.

I wish you all some stimulating and fruitful discussions. And, most important, I look forward to the lessons that will undoubtedly emerge from the debates in your workshops.

Gender Equality Indicators and Gender-Based Analysis

Notes for an address

by

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How can available gender equality indicators be used to stimulate more effective use of the principles of gender-based analysis in public policy-making?

I want to begin by characterizing what I think these indexes are telling us in the broadest terms. I think they are telling us two big stories. Please take a look at the first overhead.

Figure 1: How Can Available Gender Equality Indicators be Used to Stimulate More Effective Use of the Principles of Gender-Based Analysis in Public Policy-Making?

Two big stories emerge from gender equality indexes:

- Women continue to perform multiple roles in the economy; tremendous variety across women is the way they combine paid and unpaid work; women's role is complex, characterized by diversity.
- Women continue to do the majority of unpaid work in the economy. Results in considerable economic insecurity for many women.

The first big story that I see is that, while there have been dramatic changes over the last 50 or so years in the role of women in the family and in the workplace, women as a group still behave differently from men as a group, and fulfill different roles and functions in society and in the

economy. I believe this is one reason why it is useful to have indexes that capture things like unpaid work, indexes of working time, etc. In particular, we see that women pursue a greater variety of combinations of paid and unpaid work. There is both greater variety among women and greater variety over the life cycle of individual women.

The first big story therefore is complexity. The society and labour market have become more complex because they have become more diverse.

The second big message to come out of these numbers is that women still do the majority of non-market or unpaid work.

While women have become more diverse in their work patterns, they still do a great deal of economically important unpaid work.

I think we are all increasingly aware of the extent to which building a strong vibrant knowledge based economy requires a strong, healthy society as a foundation. The quality of our community and family life shapes our economic potential and success through avenues such as value formation, such as honesty, work ethics, cooperative norms of behaviour, through the raising of healthy children who are able to learn, through community institutions such as schools, clubs and other organizations that develop social norms and generate cohesive communities that can produce successful individuals. These numbers tell us that women still do the majority of this important socializing work, work that is vital to the prosperity of the economy. At the same time, women contribute in the workplace to an ever-increasing degree. As a corollary of this observation that women do a great deal of unpaid work, we can infer that many women have an economic security deficit.

There are undoubtedly many issues raised for policy makers by these two big stories. I want to raise three points, each of which I will illustrate with an example from the area that I work in, which is labour market policy. Please see Figure 2.

The first point I wish to make in relation to policy is that this increased complexity means that we have to become more sophisticated in our analysis and think through what diversity means for how we interpret certain outcome measures.

Increased diversity and social complexity means that we need more sophisticated policy analysis and that we pay careful attention to policy tradeoffs across different groups.

The second point is that this increased complexity also means that in a number of areas we want to carefully think through policies to ensure that they are serving the full range of diverse types that are out there. In particular, when it comes to women, we need policies that support different family and work combinations, both by making opportunities for different combinations of work and family, and ensuring that there is enough economic security associated with these choices that they are viable.

Figure 2: Three Policy Issues Raised by These Indexes

- Increased diversity and complexity means that we have to develop more sophisticated policy analysis tools, and take greater care in interpreting outcome indicators.
- Increased diversity means we have to take greater care to ensure that policies are serving different groups. In the case of women, this means paying attention to the variety of choices and the particular forms of economic insecurity that women face.
- Increased diversity means that sometimes a policy that works well for one group will be ineffective or harmful to another group. We need to be conscious of these trade-offs in order to develop sharper policy instruments.

The third point of importance for policy is that when you have different groups in society and in the labour market that perform different functions, behave in different ways and therefore have different needs, policies that are effective for one group will often be ineffective or even harmful to other groups. It is hard for me to understand how policy analysis could not be improved by confronting these trade-offs explicitly, which requires doing group-specific policy analysis; in this case what we would call gender-based analysis. One can think of this as providing the basis for designing sharp policy instruments in areas where they may be rather blunt.

My three examples can be seen on Figure 3, and provide illustrative examples from labour market policy.

Let me try to explain what I mean by my first point, by considering a general area of policy that has very recently had renewed attention in the media. I am referring to the coverage last week of the latest census numbers on the growth of part-time work.

Part-time work generally gets a negative spin in the media and, judging from some of the recent changes to EI, it gets short shrift in some areas of policy as well.

One number that is often thrown out is the figure on involuntary part-time work, which according to the 1995 Survey of Work Arrangements is about 30% of all part-time workers. This is the figure that I want to talk about. Not going into a general discussion of the merits or demerits of part-time work. Just want to get into how we interpret indicators such as this one.

Media and policy analysts frequently suggest that the growth of part-time work is undesirable.

Figure 3: Illustrative Examples from Labour Market Policy

Example 1

- Illustrates the idea that increased labour market diversity has important implications for how we interpret outcome indicators.
- Understanding the meaning of involuntary part-time work.
- We should take care in how we interpret measures of involuntary part-time work:
 - Greater diversity in the market in terms of hours of work schedules means greater “mismatch” at any point in time.
 - Because the labour market is very dynamic, many people will report that they are “involuntarily” part time because their preferences have changed and they are engaged in search. There will be “frictional” involuntary part-time employment.
- Neither of these forms of involuntary part-time employment calls for policy intervention to discourage part-time job creation.

Part-time work provides an example where a greater understanding of diversity can yield better policy analysis.

If we take this number at face value, it does indeed appear that there is some kind of a problem in the economy, that the labour market is producing too many part-time jobs. This perceived problem might lead us to decide that we should develop policies to discourage the further creation of part-time work. For example, I have heard people saying that the problem is globalization.

It may indeed be true that the economy is producing too much part-time work, but I don't think we can simply know this from the 30% number. To see why, we have to think carefully about the diversity of the labour market.

First of all, we know that there are more women working now and that a considerable share of them **want** part-time work, in response to which firms have created an increasing number of part-time job opportunities.

So the market itself has become more diverse in terms of hours of work, in response to the more diverse preferences of labour force participants.

Suppose there were just the right number of part-time and full-time jobs (e.g., 15% of workers wanted part-time work, 15% of jobs were part time), i.e. they matched the share of preferences exactly. In a static labour market where nothing ever changed, there would be no involuntary part-time work. But the labour market isn't static. People are constantly entering and leaving the labour force, moving from school to work, to family and back again. The research has shown that women use part-time work during periods of transition between full-time work and out of the labour force, because they want to. Think about a woman who has been working part time while her children were young, who decides as they get older that she wants full-time work. During the time that it takes her to find a full-time job, she is an involuntary part-time worker. Think about a young man who has been supporting his studies with a part-time job, but now has completed his studies and is making the transition to the full-time labour force. He is an involuntary part-time worker.

Much of the growth in part-time work reflects peoples' desire to work part time.

The fact that they are involuntary part-time workers does not mean that there is too much part-time work. It merely means that job search takes time and that there are frictions in the labour market. We know that there are more transitions in and out of part-time work than out of full-time work, so we might expect that there are a lot of people at any point in time that are engaged in a search process, from a part-time job. In an economy with more part-time work, more people will accept part-time jobs while looking for full-time work, rather than searching while unemployed. Again, this does not mean that there is too much part-time work; it just means that in a labour market with more diversity there will be more mismatch at a point in time.

Involuntary part-time work is a natural feature of a dynamic, diverse labour market.

These ideas are all familiar to us in the unemployment literature. We know that there is such a thing as a natural unemployment rate associated with search and labour market frictions. Thinking about the role that part-time work plays in women's lives and thinking about the implications of labour market diversity arising from the diversity of people's preferences leads us to think about the "natural rate of involuntary part-time work". I don't know what the natural rate is, nor at the moment do I know how to go about measuring it. It would increase with the share of part-time work in the economy. And it would increase with increasing post-secondary enrollments. It means that we should be careful before we start thinking that we should be discouraging part-time job creation.

There are ways to begin getting at a more useful measure. One way would be to break the measure of involuntary part-time work into incidence and duration. If duration is increasing, it may mean that there is a greater

problem. Fortunately, the nice longitudinal data sets that Statistics Canada is now producing allow us to get at exactly this kind of labour market dynamics.

Instead of discouraging part-time work, policy should be directed towards increasing the economic security of part-time workers.

This is really an important issue in a gender context because of the importance of part-time work in supporting the varied choices and multiple roles performed by women in the economy.

Instead, I think we should be focused on ensuring that part-time work provides greater economic security to women wearing multiple hats. Recent changes to EI that reduce program generosity to many part-time workers and may discourage part-time job creation are unfortunate.

Example 2 (Figure 4) illustrates the point that sometimes we can make simple changes to existing policies that increase their effectiveness to women.

Here, I will discuss advance notice, and severance laws. The information is shown on Figure 4. In British Columbia we only have the former.

Figure 4: Advance Notice, Severance Laws

Advance notice and severance laws are effective and efficient forms of labour market regulation.

Example 2

- Illustrates the idea that we can sometimes design policy in a way to make it more effective for women, without making it less effective for men.
- Individual notice entitlement depends on tenure.
- Group notice entitlement depends on size of lay-off, and therefore on firm size.
- Men and women may be distributed differently across firms of different sizes.
- Men and women may have different amounts of tenure on average when laid-off.
- Attention should be paid to the patterns of men AND women when notice schedules are designed.

Advance notice is good. If laws are designed carefully, it helps workers find jobs sooner. These are really useful laws, as they don't cost the government much, and are probably an efficient form of regulation.

Individual notice depends on tenure. Group notice in cases of plant closure depends on firm size.

Figure 5 shows the notice schedules for the province from 1990. These schedules vary quite a bit across provinces.

The distribution of women and men across firms of different sizes may differ, as may average tenure at time of layoff. This will probably vary across provinces.

Because men and women's work patterns are so different, labour market policy will not be gender neutral, and changes in labour market programs and legislation will not affect men and women in the same way on average.

The different patterns of men's and women's employment should be taken into account when designing labour standards laws like advance notice requirements.

Figure 5: Notice Schedule, British Columbia, 1990

Tenure	Notice entitlement
<6 months	0 weeks
6 months to 3 years	2 weeks
3 years	3 weeks
4 years	4 weeks
5 years	5 weeks
6 years	6 weeks
7 years	7 weeks
8 or more years	8 weeks

Example 3 (Figure 6) illustrates the point that gender-based analysis may lead us in the direction of identifying trade-offs between different groups of workers that are inherent in policies.

Figure 6: Minimum Wage Policy

Workers who stay in the minimum wage market longer are more likely to benefit from a higher minimum wage.

Example 3

Illustrates the way that gender-based analysis can help us identify winners and losers by group. Can assist us in developing sharper policy instruments.

Minimum wage increase:

- May increase probability that a worker is laid off.
- May increase the duration of unemployment spells.
- Will increase wages of minimum wage workers.

Effect on income of a minimum wage worker:

- Falls because of more time spent unemployed.
- Rises because of higher earnings when working.

Net effect increases earnings if second effect is bigger than first effect.

Probability that this is true is greater the longer the amount of time a worker spends in the minimum wage labour market.

Possible that minimum wage increase could help adult women, hurt teenagers.

- Increases in the minimum wage. Old story is it may reduce employment opportunities, while raising wages for those who remain employed.
- Obvious way in which minimum wage policy might not be gender neutral is if women fill a disproportionate share of jobs. Well over 60% of minimum wage workers are women, about half are part time.
- Less obvious way in which minimum wage increases might not be gender neutral, that goes back to this old trade-off.

Higher minimum wages increase the amount of time low-wage workers are unemployed, but increases earnings during periods of employment.

It's not really the case that some people gain because they keep their jobs, while others lose because they lose their jobs, when the minimum wage increases.

Instead, everyone in the minimum wage market may experience less employment, but at a higher wage. Less employment because more likely to be laid off, less likely to be rehired. Increases both the incidence and duration of unemployment spells. Note that this is a theory. Working on a project that is putting together empirical evidence on this topic. The first stage shows that incidence of a layoff does increase. It is not known yet what happens to the duration of unemployment.

The gain or loss for a particular worker arising from an increase in the minimum wage consists of two parts – the lost earnings if spending more time unemployed, and the increased earnings from the higher wage when employed.

The probability that a worker will benefit from an increase in the minimum wage is greater if she will be in the minimum wage market for a long time. This worker will then reap the benefit for longer, more likely to offset the short-term cost of more unemployment.

If it is true that women stay in the minimum wage market longer than men on average do, then women are more likely than men to benefit from increases in the minimum wage. For example, most men in the minimum wage market are teenagers who move relatively quickly up the job scale.

Here, we see that understanding the differences in labour market behaviour of men and women tells us something about whom the winners and losers are likely to be from such a policy. This will allow us to think more carefully about whether or not this policy is likely to succeed in achieving its goals. We might decide that adult women were the targets of the policy, rather than teenagers, and we might decide that it is more successful than would appear in a non-gendered analysis.

I have not documented all this so don't go quoting me to your friends. I merely mean to illustrate the ways in which we have to think carefully about how differences in the labour market patterns of men and women interact with policies to produce non-gender neutral results of policy changes. I think we need gender-specific analysis of the impact of policy on the labour market.

If women remain in the minimum wage market far longer than men, minimum wage policy may have a gender-specific impact.

If policy has different effects on men and women, gender-based analysis is critical.

Key Concepts in the Identification of Best Practices for Development and Use of Indicators of Gender Equality

Notes for an address

by

Margaret K. Dechman

Nova Scotia Advisory Council on the Status of Women

The views expressed are those of the presenter and do not necessarily reflect the views of the Province of Nova Scotia or the sponsors of the Symposium.

I am going to talk about the practical application of gender equality indicators within the government context. The points I will cover have been developed from interviews with Status of Women officials from across Canada. I would be happy for them to take credit for their valuable contributions. On the other hand, they can also feel free to “shoot the messenger” with respect to points where they disagree with my presentation.

My presentation will address three questions. The first two questions really set the stage for the final question discussing the steps to best practices. I will begin by talking about what we consider best practices to be and how best practices in government differ from best practices in the private sector. Next, I will briefly describe the type of restructuring that is occurring in government as a context in which gender equality indicators can be used. The remainder of the presentation will focus on the creative balancing that is needed to successfully design and use gender equality indicators.

Figure 1: What Do “Best Practices” Mean in the Government Context?

- Where do gender equality indicators fit within government restructuring?
- What balances are necessary to promote the successful use of gender equality indicators?

By their very nature, best practices are context specific.

One point, on which I think we would all agree, is that there is no one correct linear path for integrating Gender Analysis into government policies and programs. Best practices are, by their very nature, context specific. What works in one jurisdiction may not work in another jurisdiction. What works at one point in time may not work at another point in time. In many cases, best practices depend more on people feeling ownership of the ideas and methods than on technical steps or considerations. What we need is the enthusiasm that can only be developed by having people feeling ownership for their direction – making things work for them in their own way. Thus, rather than describing activities in specific jurisdictions, I will talk more generally about what we consider to be some useful building blocks that may assist with the development and use of gender equality indicators.

The reason there is not one path to success in the development and use of gender equality indicators is because this, like other policy related work, is really a balancing act. Rather than suggesting any prescribed “best practices” with respect to gender equality indicators, I am going to talk about the competing considerations that come into play throughout the process of developing and using indicators and suggest some ways of seeking balance.

Governments must work in ways that reflect the many diverse needs of diverse citizens.

One criticism directed toward government attempts at restructuring and performance measurement is that they borrow too heavily from the private sector. Private sector notions of “best practices” are closely linked to capturing new markets, cost effectiveness, gaining competitive advantage and, in the final analysis, increasing profitability. Is this what we expect from government? While our relationship to business is that of consumer, our relationship to government is primarily one of citizen. We expect government to be working in our best interests. Private businesses are free to exploit whatever markets are most viable. Governments must work in ways that reflect the many diverse needs of diverse citizens. This concept of government responsiveness to public interests underlies much of the discussion about the development and use of gender equality indicators in government.

Figure 2: Best Practices are Context Specific

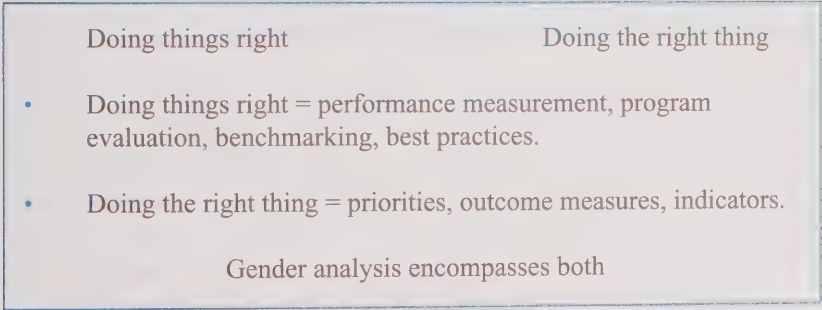
- “Best practices” in government.
- “Best practices” in private industry.

There is a lot of talk about government restructuring not only across Canada but also in many other countries across the world. This includes discussions of accountability, fiscal responsibility, benchmarking, efficiency and effectiveness. The changes that are occurring in government require the careful balancing of two distinct components – “doing things right” and “doing the right thing”. The “doing things right” side of the equation is closely tied to fiscal restraint and includes performance measurement, program evaluation, and best practices. Is government providing services that work in a cost effective manner? The “doing the right thing” perspective is quite different. We can provide the most efficient services and programs but if they are not directed toward what we really want as citizens, all is for nought. This concern is reflected through government efforts surrounding the articulation of priorities, outcome measures, and indicators. We are looking, not so much at what we are doing or how we are doing it, but where we are going.

Changes occurring in government require a balance between “doing things right” and “doing the right thing”.

Comprehensive gender analysis includes both sides of this balance. We are interested in monitoring and evaluating government programs and services to determine their impacts on women. At the same time, we need higher level gender equality indicators to represent high level social goals toward which we wish to progress.

Figure 3: Balancing “Doing Things Right” and “Doing the Right Thing”



If we take as our starting point that gender equality indicators are to depict the goals toward which we want to progress, it necessarily follows that the development of useful indicators depends on broad-based involvement of relevant stakeholders.

The development of useful indicators depends on broad-based involvement of relevant stakeholders.

One of the most consistent messages we heard from Status of Women officials across the country is that success in the progress of women's issues depends on the combined strengths of people working both inside and outside government. People from various government departments,

women's groups, universities, and the public all need to work together to make things happen. The positive changes that have taken place at both federal and provincial levels have come from a multi-faceted approach with both governmental and non-governmental people striving toward the same end.

Along this same train of thought, some Status of Women officials talked about the fact that real progress depends not only on public policies but also on private behaviours. The very act of providing statistics can turn what may have been viewed as a private concern into a social issue. For example, the provision of statistics on family violence has the potential to help women recognize that this is not just their personal problem and not their fault. Because of their unifying nature, carefully constructed gender equality indicators that speak to the realities of people's lives can serve as goals toward which we can all progress in both our public and private lives.

These lofty expectations for gender equality indicators obviously depend on developing measures that really reflect women's interests. One of the most important balances involves developing measures that can unify support and action but at the same time incorporate the diversity of women's perspectives. If gender equality indicators are to reflect the goals toward which the women of this country want to progress, they must include the diverse input of many different perspectives. One of the first obstacles to gaining comprehensive input in the construction of gender equality indicators is that people often feel left out if they do not have a statistical background. To avoid this problem, we must have thorough discussions of women's visions that are quite apart from concerns about how one would measure these concepts.

A second challenge relates to building consensus. If the indicators are to represent the interests of the women of Canada, they must incorporate many different perspectives. However, if the indicators are to be a unifying force, there must be some agreement on where we are going. The balance to be struck relates to encouraging and fostering diverse input while at the same time working toward measures that will serve to bring women together, not drive them apart. In the final analysis, this process of consensus building is based on building trust, respect, and commitment. Status of Women officials talked a lot about these intangible components of the process that actually make it work.

One of the forces that sometimes undermines our ability to elicit the full diversity of perspectives is the operation of power dynamics between groups or individuals. While it is clear that indicator development and use depends on the combined contributions of policy analysts, statisticians,

academics, women's groups, and all women; balanced input is not necessarily to be gained by bringing them all together. One interesting method of supporting the input of diverse perspectives, while moving toward consensus, involves a multi-step approach whereby people are consulted about their opinions individually or in small homogenous groups. Having collected diverse opinions in this manner, results are then distributed to all participants. Those holding different perspectives can gain insight into the positions of other participants without becoming defensive. This more dispassionate approach can have real success in helping diverse groups identify common interests and creative approaches. Often, by the time one reaches a second or third consultation with the participants, perspectives have come closer together and have, in fact, built on each other.

One of the points of contention most frequently mentioned by Status of Women officials was the question of what we really consider to be progress for women. Are we looking for parity with men or are we looking for an improvement in the quality of life of women? Some would argue, these do not always go hand in hand. I believe both of these perspectives are valid. The question is how and when to use one approach as opposed to the other. (See “Integrating Indicators into Analytical Framework” in the background paper on “Using Gender Equality Indicators: Steps to Best Practices” for more detail on this issue.)

While we need measures of gender parity in areas such as economic security, we also need to be careful that women's realities do not become distorted by a constant use of men's realities as the benchmark against which women's lives are assessed. The whole area of unpaid work has been developed specifically to address the enormous contributions women make that are not sufficiently valued because they fall outside of the economic model of paid work. Unfortunately, media coverage of the statistics on unpaid work often distort this objective by presenting discussions not of women's contributions but instead of comparisons between women and men. We read things like: women are still doing more housework than men, but men are doing more than they used to, and men are still doing the yard work. Is this the point we really wanted to get across by measuring unpaid work? Lets look at the presentation of this information in a different way that speaks to women's realities quite apart from any discussion of men.

**We must not risk
distorting realities of
women by the constant
use of men's realities as
the benchmark against
which the lives of
women are assessed.**

I want to make clear that the numbers I am using are hypothetical. What I want to portray is the different tone that can be carried when we focus specifically on women rather than using the familiar media approach that pits women against men.

Consider the message that would be portrayed if, rather than comparing the number of hours of housework women and men do, we said:

- 60% of women with young children work outside the home.
- 40% of these families would fall below the poverty line if mothers were not working outside the home.
- On days when these women are working outside the home, they spend an average of 14 hours on employment, commuting, housework and their children.

The question I would pose in terms of trying to come up with a compromise solution is: “Does this need to be an either/or question or can we develop indicators in such a way that they reflect both gender parity and women’s unique contributions”?

Figure 4: Balancing Creating Cohesion and Embracing Diversity

Creating cohesion	Embracing diversity
<ul style="list-style-type: none">• encouraging diverse perspectives• building consensus	

To this point, gender analysis has focused very heavily on program evaluation and service delivery. The development of gender equality indicators brings the balance of ensuring a continuing focus on larger goals.

Gender analysis must consider issues related to program evaluation. Does a particular program or service further the needs of women? However, if we allow gender equality indicators to be reduced to this level of detail, we run the risk of policy analysts becoming so narrowly focused on specific programs or policies that they lose sight of the bigger picture. We need gender equality indicators to provide the general direction in which we want to progress. There are many strengths to be gained from using gender equality indicators as government priorities. Status of Women officials, who are working toward the use of high level social indicators in government, discuss their benefits in terms of promoting inter-departmental cooperation and strategic action.

Gender equality indicators are needed in order to provide the general direction in which to progress.

Experiences with the use of outcome-focused measures in other countries have shown that to be most useful they must be presented at a higher level than what could be considered an output from government programs or policies. The broader social realities we wish to reflect with gender equality indicators go far beyond any particular government initiative. I think some of the problems that have arisen in other countries that have gone before us in these restructuring efforts is that they call indicators, outcomes. The very word outcome makes it sound as if we expect what we measure to be the final result of government programs and policies. It is not possible, or even desirable, to view major social and/or economic changes to be the end result of any one government initiative. If indicators become conceived as specific departmental outcomes, we lose the broader focus that is needed as the guide or goal toward which government work must be directed. The word indicator, presents a different, and I would argue, more constructive approach for keeping the broader perspective of social responsibilities before the eyes and in the minds of government workers.

Back to the question of balance – we need to have performance measures and evaluations that bring gender analysis down to a level that identifies the effects of specific government programs and policies. However, on the other side of the scale, we need high level social indicators that ensure we are still going in the right direction.

Figure 5: Balancing Performance Measurement and Outcome Focus

Performance measurement	Outcome focus
<ul style="list-style-type: none">risks in reducing outcomes to performance measuresbenefits of maintaining a broader focus for gender equality indicators	

One of the real benefits of the restructuring that is taking place in government is that it emphasizes more detailed analyses of the factors or forces that underlie a particular outcome or indicator. If we are to focus our attention on working toward a certain goal, we must first understand what conditions contribute to that goal. This more analytical approach to public policy fits very well with the basic premise and structure of gender analysis. When we ask a question like: “How can we promote high school completion?” it quickly becomes evident that gender analysis is needed to

formulate effective program development. The reasons girls and boys drop out of school are quite different; therefore, the programs developed to address this outcome would be quite different for girls and boys. When we come down to questions of really making things work, gender analysis is a necessary part of the puzzle.

While indicators are necessary to point the direction and identify trends, more detailed underlying analyses are needed to predict and prepare policy interventions. Many Status of Women officials have been very involved, for instance, in assessing the possible impacts of changes to the CPP and Seniors' Benefit for women. Detailed analyses can provide us with the ability to take a more future-oriented approach that can serve to identify and correct problems before they arise. This future orientation of gender analysis is particularly important because it is difficult to change policy or program decisions after they have been made. It is much more successful to prevent problems from arising by being involved during the early stages of developing public policy.

We must, however, address another issue of balance. While numbers are important for directing government action in a way that is reflective of reality rather than based on myth, Status of Women officials are quick to point out that numbers never tell the whole story. Good policy analysis and strategizing is in many ways more of an art than a science. There is a tenuous balance between making the most of statistical models and losing our grip on reality. While indicators and their underlying analyses are the foundation, good decision making is based on much more.

There is a trade-off between having repetitive, well-known measures and measures that are responsive to ever-changing social realities.

This balance of adhering to existing models or questioning their connection to reality is played out in the trade-offs between having repetitive well-known measures and having measures that are responsive to ever changing social realities.

Figure 6: Balancing Statistical Models and Reality

Statistical models	Reality
•	new outcome focus in government supports gender analysis
•	statistical models are important for action
•	strict adherence to statistical models is counterproductive

It is clear through my discussion that I have viewed the development and use of indicators as a process. To a large extent, the dissemination and use of indicators depends on creating consensus and ownership, defining as a social indicator rather than a program outcome, and embedding the indicators within a larger analytical framework. However, communication is also an important consideration.

The diverse audiences we have outlined as stakeholders of, and thus audiences for, gender equality indicators require different types of presentations. The balance I am speaking of in this aspect is between clarity and statistical complexity. There is no doubt in anyone’s mind that indicators of social phenomena are complex by their very nature. While statistical measures must reflect this complexity, they must also be readily interpretable to all of the diverse stakeholders so that we do not lose anyone in the process. One way of dealing with this balancing act is to use a variety of communication tools and strategies that are suitable for different audiences. I will give the relationship between elected representatives and policy analysts as one example. It is important for elected representatives to keep a handle on the bigger picture and this is exactly what social indicators are designed to do. However, the increased use and misuse of statistical information has brought along with it a healthy dose of skepticism. It is the job of policy analysts and researchers in government to carefully assess the validity of the information they are to present to their ministers. While high level social indicators are useful for presentations to ministers, their use will not go far if policy advisors do not have the detailed breakdowns and analyses necessary to assess the credibility of the indicator and to place the information gained from the indicator within the context of government priorities, policies, and programs.

Figure 7: Balancing Clarity of Presentation and Statistical Complexity

Clarity of presentation	Statistical complexity
<ul style="list-style-type: none">• success of communication and use depends on preceding steps• different presentations for different audiences• tying the numbers back to reality	

Throughout this presentation I have talked about the place of gender analysis within the new structures of government. I have talked about the

natural fit between gender analysis and this new approach to government work. The question one would naturally ask is “Why are we having so much difficulty implementing gender analysis”?

I would argue that many of the difficulties we have confronted with gender analysis are precisely because we are leaders in this area of government reform. I think it is clear to all of us who are involved in gender analysis that there is not a magic formula. We cannot say to a government department “add a plus b and divide by c” and you will get gender analysis. The number crunching exercise of separating out statistics on women and men, while I do not mean to undermine its importance, does not constitute all there is to gender analysis.

As various government departments and agencies are starting to engage in gender analysis we are increasingly hearing the comment: “but, that is not good gender analysis”. I believe this is because good gender analysis cannot be reduced to a prescribed formula, it depends instead on the commitment and creative capacity of people both inside and outside government working toward the goal of equity.

The obstacles we are encountering occur not because gender analysis does not fit in government restructuring, but instead because Canadian governments are just starting down this road. As new processes and procedures become more entrenched in government, the promotion of gender analysis will become easier. The obstacles we are confronting today can in fact be seen as our greatest opportunity. A number of Status of Women officials across the country are closely involved in the development of indicators or outcome measures for their jurisdictions. The knowledge gained from our deliberations on issues related to gender analysis put us in a good position to be leaders in these endeavours.

Our involvement in women's issues and gender analysis means that we have a good understanding of the intricate connections between “doing things right” and “doing the right thing”.

Figure 8: Is Gender Analysis Ahead of Its Time?

- Is gender analysis ahead of its time?
- Obstacle or opportunity?

Paradigms Implicit in Social and Economic Indicators

Notes for an address

by

Monica Townson

Monica Townson Associates Inc.

I have been asked to focus on the second of the four major themes of this symposium. That is what has been called “Paradigms implicit in social and economic indicators.” As you will have seen from the background information, various federal projects are now under way to develop social and economic indicators. The questions we are asked to deal with under this second theme are these:

- In what major areas do their underlying assumptions or paradigms about major policy-relevant social and economic variables and their causal linkages diverge or overlap? and
- What opportunities exist to achieve improved “rapprochement” among these projects after their divergences are considered?

The background paper on this theme was prepared by Mike McCracken of Informetrica and Katherine Scott of the Canadian Council on Social Development. I hope everyone has had a chance to read it, because it provides an excellent basis for the kind of discussion we will get into in the workshops. It also has some very useful suggestions for discussion questions and it highlights some of the assumptions that have been made in the development of social and economic indicators, that we will also want to question and discuss here over the next couple of days.

I’m not going to summarize the paper. But I do want to pick up on some of the key points, and perhaps take issue with one or two of them – or at least suggest that they be pushed a little further. By the way, when I refer to this background paper, I’ll call it “the Theme Paper” to distinguish it from other papers and documents on indicators that are out there for discussion.

First, let me say I think it is useful to make a distinction between gender equality indicators – that is, indicators that are developed specifically to measure gender equality; and social and economic indicators – that is

indicators that are developed to measure progress of a society or of the economy, and that may or may not fully incorporate measures of gender equality. Both activities are needed and both are important.

Measures of gender equality must also be incorporated into the general social and economic indicators.

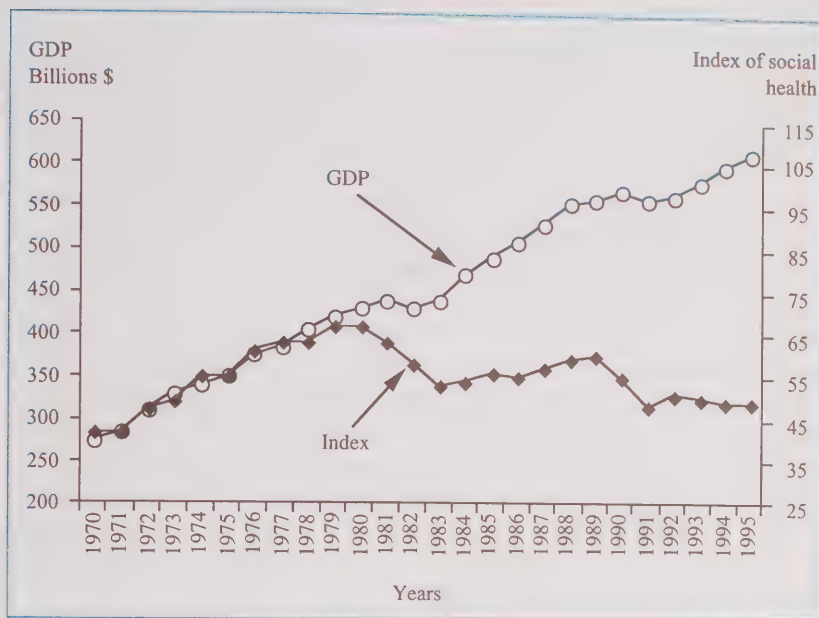
We need measures of gender equality, but they must also be fully incorporated into our general social and economic indicators. The Theme Paper refers to this process as the development of as “gender-sensitive indicators”. This is the area where I think we need to work towards the “rapprochement” that the workshop theme refers to.

Think, for a moment about the United Nations Human Development Index (HDI), which the Prime Minister and many others tell us shows that Canada is “the best place in the world to live”. The HDI compares countries on three basic measures: life expectancy, educational attainment and per capita income. But the annual report on the HDI also includes a gender development index which adjusts the HDI for inequality between women and men. It turns out that when women’s experience is factored in, Canada is no longer top of the list. The question to be asked here, of course, is whether an indicator that fails to include gender equality measures can be considered adequate or credible as a measure of the “human development” of any society.

The Theme Paper does a good job of reviewing some of the economic indicators, such as Gross Domestic Product (GDP), unemployment rates and other labour force indicators, and it explains how women’s experience and women’s work is excluded. As the Paper notes, “Indicators are not neutral statistical constructs. They validate particular world views and prioritize selected areas of knowledge.”

I think that’s why there has been such strong pressure over recent years for the development of social indicators or indicators of well-being – if only because the traditional economic indicators did not seem to reflect accurately what people felt was the reality of their lives. The Index of Social Health, constructed by Satya Brink and Allen Zeeman at Human Resources Development Canada, plots quite dramatically what has been going on. It shows that while GDP per capita has been steadily increasing, social health has declined.

Figure 1: Index of Social Health and GDP (1986 Prices). Canada, 1970-1995



But neither of the lines on that chart really incorporate women's experience. As we know only too well, GDP per capita excludes much of the work that women do, because it is unpaid. And by the way, it's an interesting question as to what would happen to that top line if unpaid work were included, not to mention how we would then interpret it.

The Index of Social Health, which is an adaptation of the well-known Fordham Index of Social Health, developed at Fordham University in New York State, uses 18 indicators, from infant mortality to child poverty, drug abuse, unemployment, and average weekly earnings. On some of the measures used, there are significant differences between women and men. But, as the Theme Paper points out, this index is "gender neutral."

This is where I would have liked to see the authors of the Theme Paper take a stronger line. After all, earlier in the Paper, they say clearly that "Social and economic indicators based on a male standpoint not only privilege male experiences and standards, but also work to render invisible female experiences, activities and world views". They also point out that research that is sometimes labeled as "gender neutral" might more appropriately be called "gender invisible." It seems to me that this is a crucial point – especially if we are trying to get away from traditional indicators like GDP per capita and construct indicators that truly reflect the well-being of society.

"Social and economic indicators based on a male standpoint not only privilege male experiences and standards, but also work to render invisible female experiences, activities and world views."

In their June 1997 paper on “Measuring Social Well-Being”, Brink and Zeesman say that “Controversial indicators, that may have conflicting social or moral interpretations, such as teenage pregnancy or divorce, were excluded”. Would gender equality have been considered “too controversial” for inclusion? I don’t know. But I could find no mention of gender whatsoever in their paper. Surely there is some way to integrate the kind of work outlined in Status of Women’s Gender Indicators project into this Index of Social Health. The ISH includes a measure of the gap between rich and poor. What about a measure of the inequality between women and men? We need some creative thinking here. Perhaps we can generate some of that in the workshops today.

The *Economic Gender Equality Indicators*, commissioned by the Federal-Provincial/Territorial Ministers responsible for the Status of Women, are described in the Theme Paper as “an innovative attempt to better understand gender equality in Canada” and I think that’s a good description. As the Theme Paper documents, women’s situation has often been measured against male standards. Gender Equality Indicators are intended to address that.

But that adaptation of the standard of measurement is a crucial problem that social indicators must attempt to overcome. I see this as a major challenge in the development of social indicators now being undertaken in Canada. I think it involves a radical and fundamental shift in thinking for many of those who are working on social indicator projects. This is also a challenge that the Theme Paper doesn’t really take up – although it may be that the results of our deliberations in the next two days will give the authors of the paper some ammunition with which to boost their arguments on this point and to come up with some recommendations on how it might be done.

I hope they will also be able to flesh out the section on “Future Directions for Research and Recommendations” as a result of this symposium. As they note, their lists of criteria for good indicators, for example, are “general lists” that do not address the gender dimension directly. Of course, many people now understand the importance of data that are disaggregated by gender. But I have a feeling that sometimes that understanding is quite superficial. People may not yet have truly comprehended the nature of the shift in thinking that is required if gender equality is to be completely integrated into their work. I hope we will be able to come up with some concrete ideas on how this fundamental shift in thinking could be made a reality. Let me just give you a couple of examples, that I think will illustrate what I mean.

Adaptation of the standard of measurement is a crucial problem that social indicators must attempt to overcome. It involves a radical and fundamental shift in thinking for many of those who are working on social indicator projects.

An inter-departmental committee, incorporating a number of federal government departments, has recently been wrestling with the issue of social cohesion. It's one of those popular buzz words in Ottawa these days. No one knows what it means, but everyone is supposed to strive for it. The Committee came up with a definition of "social cohesion" as "an ongoing process of developing a community of shared values, shared challenges and equal opportunity in Canada".

Let's just look at that for a moment from the point of view of gender equality. First, the use of the term "equal opportunity" would raise the hackles of anyone who has worked in employment equity and who understands that providing "equal opportunity" for disadvantaged people who have suffered generations of inequality, does not move us very far towards equality or justice – which presumably is what we need if we are to achieve "social cohesion". And what about "shared values"? Do those shared values include values of gender equality? We don't know.

But the Committee has apparently developed an extensive program of research directed at improving "social cohesion" – whatever that term means. It has apparently also decided that gender breakdowns will be provided for all data to be used. It will study relations between different ethnic groups, regional differences, urban and rural differences and inter-generational equity – amongst other things – to see how these differences might have an impact on social cohesion. But apparently it has not occurred to the group to look at whether continued inequality between women and men may in itself undermine "social cohesion".

The moral of this story, of course, is that gender issues must be central to the research and not just an added dimension of each topic studied. It is important in the selection of the data to be used; in the design of surveys and data collection methodology; in the interpretation of the data; and in the construction of indicators. I think it requires a really deep and fundamental understanding of – to use a jargon term – "the new paradigm," or what we're trying to do. That understanding has to be almost at a gut level. How can we achieve it? This, I believe, is the real challenge in the development of gender-sensitive social indicators. In my view, disaggregation of data by gender is not enough to ensure this. But that's a question we may want to address in the workshops today. Let me just give you one more example, though.

Gender issues must be central to the research, and not just an added dimension of each topic studied.

Last week, *The Globe and Mail* ran a column by futurist John Kettle headed "Women snap up prime jobs." It was based on employment data from the 1996 Census. In the 21 years from 1975 to 1996, Kettle said, women took 57% of new managerial positions and 65% of the

professional jobs. And he said, “That may shatter a few notions of the glass ceiling that is said to prevent them from getting their fair share of top jobs.”

Although he admitted that “the available statistics don’t detail the share of jobs held by women at each level of management or in the professions”, Kettle concluded that the numbers suggest “That something like a socio-economic revolution took place in the past two decades, making women closer to equal partners in management and the professions. Some of the numbers might even be used to suggest that men are now being discriminated against – or perhaps they prove that on an even playing field, women really are smarter.”

These examples illustrate quite well how difficult it is for those who understand at some superficial level that gender differences must be addressed, but who don’t seem to have a clear understanding at a fundamental or gut level of just what that means in terms of the work they are doing.

I’m sure I don’t have to spell out for the people in this room today what’s wrong with those conclusions. It’s the kind of thing the Theme Paper describes as a construction of equality where men are held up as the “standard” against which to measure progress. But I think these examples illustrate quite well how difficult it is for those who understand at some superficial level that gender differences must be addressed, but who don’t seem to have a clear understanding at a fundamental or gut level of just what that means in terms of the work they are doing.

How can this basic and fundamental understanding and awareness be inculcated in those who work on social and economic indicators and those who generate the data that are needed? I don’t know, but I believe it’s essential that we find some way to do it. Birgitta Hedman and Francesca Perucci, who presented a paper on “New Challenges in the Improvement of Gender Statistics” to the International Institute of Statistics last year, suggested that “All producers of statistics should be sensitized to gender issues.” But how do we make that operational?

The Theme Paper has some good examples of areas where women are invisible. The authors refer to data on part-time work generated by the Labour Force Survey, the design of which “is based on typical male patterns of work, and consequently does not capture the reality of women’s lives.” The Theme Paper also points out the gender bias in income and poverty studies based on data sources that are organized around the household as the unit of analysis. But even the most aware people – including some at Statistics Canada – still seem to be having trouble addressing that problem.

For instance, Status of Women’s paper on gender indicators points out that a measure of women’s wealth – that is financial wealth – remains a high

priority for future work. This paper also notes that “The family or household is not a suitable unit for gender equality indicators.” Yet Statistics Canada’s new Asset and Debt Survey – which, incidentally is the first to be undertaken since 1984 – will be based on the family, so it looks as if it will be impossible to generate any data from that survey on the financial situation or wealth of women. And this despite the efforts of a number of people to suggest a different approach. Sometimes, it seems, the reality of collecting the data needed to measure women’s equality is just too daunting.

Sometimes, it seems that the reality of collecting the data needed to measure women’s equality is just too daunting.

I don’t want to end this on a pessimistic note. We shouldn’t forget that these are all really tough challenges. What I think is really exciting is that we are all here for the next two days ready to tackle them.

Procedures for Developing Gender-Sensitive Statistics: The Case of Sweden

Notes for an address

by

Birgitta Hedman

Head, Gender Statistics, Statistics Sweden

Working with gender statistics has lead me from working in a man's world to working in a world of women and men. In the process, I have discovered that there is a considerable lack of knowledge and insight concerning gender statistics; what they are really about and why we have policies concerning gender equality.

The process of developing gender statistics is similar to the development of other types of statistics, with the exception that in the former we begin by addressing questions specifically related to the situation of women and men. What are the problems in society? What are the needs for improvement? What are the goals?

Development of gender statistics must start with identification of questions related to gender concerns.

Figure 1: Working for Equality Between Women and Men Implies To:

- See and recognize women's and men's reality in various phases of the life-cycle and in various socio-economic groups.
- Discuss what is good and bad in women's and men's lives.
- Decide if the identified differences and similarities between women and men are acceptable.
- Identify problems related to existing inequalities and the underlying causes of the problems.
- Establish goals to reach equality in various spheres of society.
- Work actively to reach the goals for equality.

Gender issues are relevant in all policy areas.

In 1983, that was our starting point in Sweden. Statistics Sweden responded to the users' demands for improved statistics about the situations of women and men and as a result established a formal unit for gender statistics. A group of statisticians set forth to shed light on the situation. We assembled groups of users, and asked them to identify the problems with respect to areas where they needed improved statistics. The discussions lead us to characterize gender issues as any aspect of the lives of women and men, and gender relations that affect life in society and have an effect on development. Gender issues, therefore, are relevant in all policy areas.

Figure 2: Gender Issues

- Any aspect of women's and men's lives and gender relations that affects life in society and has an effect on development.

Statistics provide a way to describe reality and to raise consciousness about the realities. Statistics also stimulate ideas, provide unbiased bases on which to build policies, and monitor change. But we need to address the following question: Whose reality do we find in official statistics today?

Gender statistics imply statistics by sex, reflecting gender issues.

We defined "gender statistics" as statistics concerning the situation of women compared to men. To achieve these comparisons, we need to ensure that all statistics on persons are collected by sex, that analysis preserves sex as a primary classification, and that analysis is focused on key gender-related issues, taking into account life-cycle and socio-economic factors. The statistics can also be used to form indicators when we know the nature of the problems that need to be addressed.

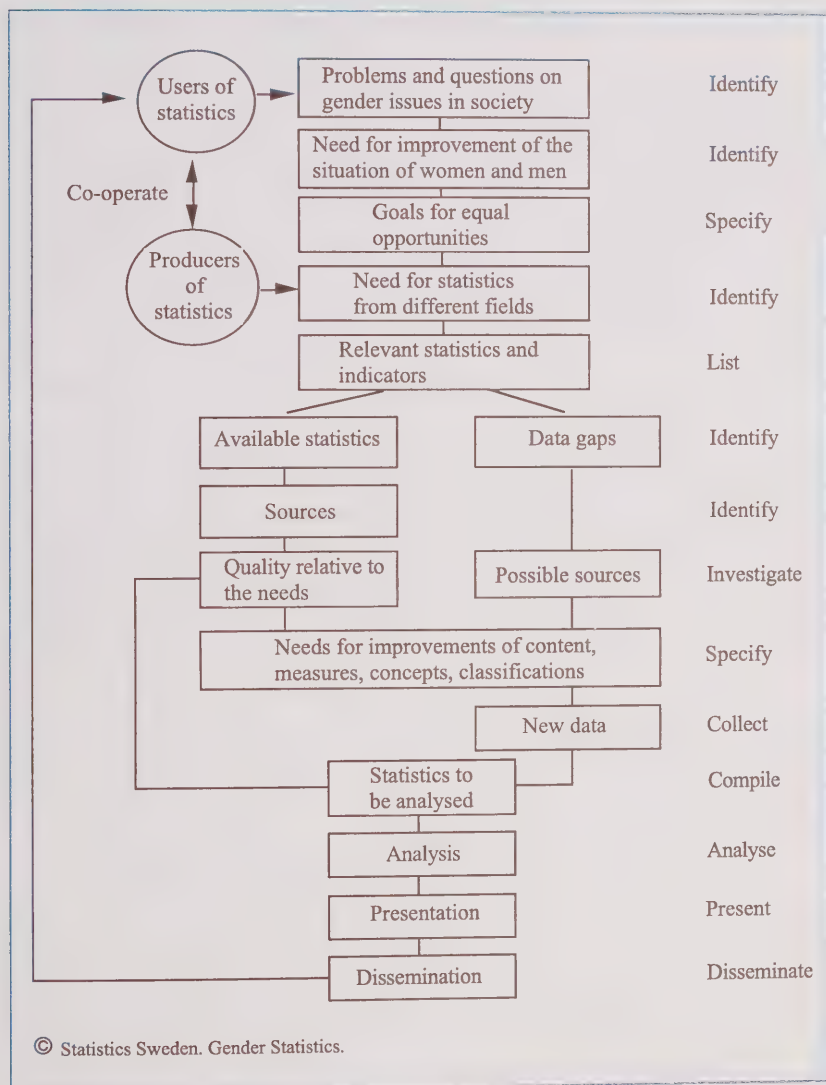
Figure 3: Gender Statistics

Statistics on the situation of women compared to that of men in all spheres of society

- All statistics on individuals are collected by sex.
- All variables and characteristics are analysed and presented with sex as a primary and overall classification.
- All statistics reflect gender issues.

Fifteen years ago, when we had meetings with important potential users, we listed the statistics we thought they needed, after having listened to their questions. We started with a long list, and then narrowed it down. The types of statistics requested by the users covered most of the traditional statistical fields.

Figure 4: Gender Statistics – The Production Process



The identification of needed statistics results both in user-friendly presentation of available data and development of new, gender-sensitive statistics.

The next step was to go from needed statistics to available statistics. We compiled the available statistics with satisfactory quality and took notes on quality problems and data gaps. We found that most of the available statistics were gender blind. Those that were not tended to show data for women only; although some presented data for both sexes, men were always placed before women. Social and economic indicators were also to a large extent gender blind.

When we analyzed and presented the statistics, we tried to put ourselves in the users' place, addressing the questions that they wanted answered. We also gave priority to a gender statistics publication which would be suitable for a wide range of statistical users. We produced a booklet entitled *Women and Men in Sweden*, which became and continues to be the best seller of Statistics Sweden. It is produced every three years. In addition, lengthier books on specific gender concerns have been produced over the years, as well as fact sheets and posters focussing on gender statistics. We are often called upon to be lecturers at seminars and training courses on gender concerns. We present facts on the situation of women and men as an objective base for discussions.

Improved gender statistics are specifically needed on economic and non-economic activities, poverty, household characteristics, health and domestic violence.

Women and Men in Sweden has become a model for similar work in other countries. Work with these countries has revealed areas where the improvement of statistics is especially important. These areas include: measurement and valuation of unpaid work, statistics on the informal sector, satellite accounts, data on time use and time poverty, household information which would reveal all individuals for comparison purposes, without use of the concept of household head, and violence against women (and men).

Figure 5: Improve Quality of Existing Statistics and Fill in Data Gaps

Important fields of work are:

- Measurement and valuation of paid and unpaid work.
- Measurement of poverty and access to resources.
- Household data and gender roles in the household.
- Morbidity and access to health services.
- Violence against women.

As a result of the progress made in Sweden, government regulations were passed in 1994 which provide that official statistics relating to individuals should, if no special contradictory reasons exist, be disaggregated by sex. Since 1994, a national policy also exists whereby all decisions at all levels of government should include analysis of the consequences for women and men respectively. Gender statistics are necessary in this work.

Knowledge of gender concerns is a prerequisite for action and change. Two years ago, Statistics Sweden began being actively involved in gender analysis training of top level managers in the public sector, including political leaders in the government. The training is organized by the government's Equality Affairs Division. During these seminars (usually half a day in length), the participants are asked to identify what things, in their perceptions, are good and bad for women and men in Sweden today. We continue to specify what is implied by the concept of equality between women and men and in the national policy. Statistics are used to illustrate the realities of women and men in various phases of the life cycle and in various socio-economic groups, related to the problems raised by the participants. Finally, we discuss what they felt should be changed in their fields of responsibility, and what they should do to bring about the needed changes.

Progress will require close and continued cooperation between the data users and the producers of statistics. Since gender statistics imply integration of a gender perspective in all statistical fields, it is the responsibility of all subject-matter statisticians to improve their statistics. The best way to achieve this is to have gender-sensitized users direct their needs to the various statistical specialists. An ongoing dialogue on gender issues and the need for statistics will improve the usefulness of the entire statistical system.

Political leaders and public sector top level managers are trained in gender analysis.

Integrating a gender-perspective in statistics is the responsibility of all subject-matter statisticians.

Figure 6: Users and Producers of Gender Statistics

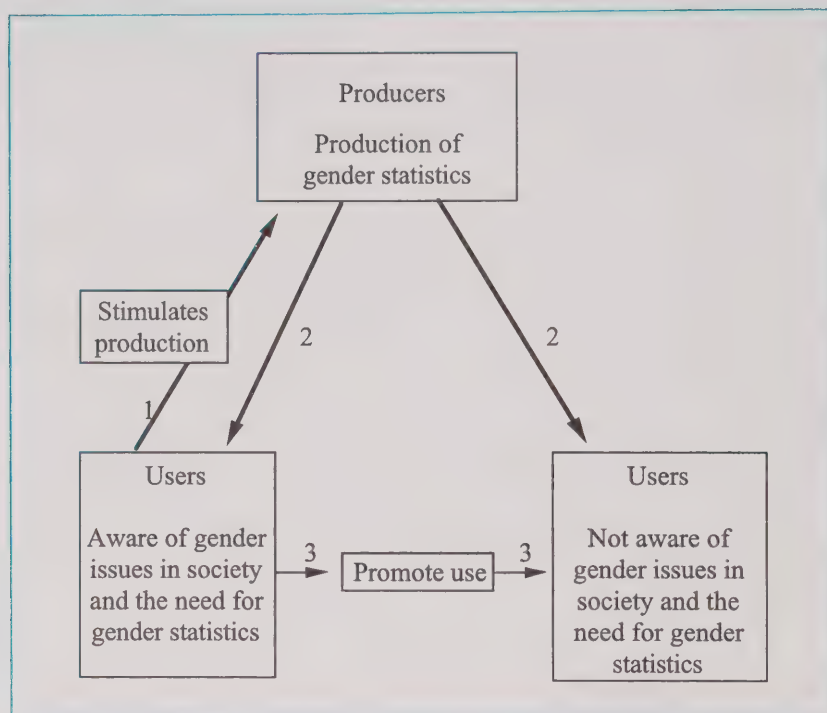


Figure 7: What Needs to be Done?

- All producers of statistics should be sensitive to gender issues.
- A gender perspective should be integrated in all traditional statistical fields.
- Reach out to users with relevant statistical information on gender concerns.
- Users and producers of statistics should regularly:
 - review the adequacy of the official statistical system and its coverage of gender issues;
 - prepare a plan for needed improvements, where necessary.

Gender Equality Indices in the Human Development Reports: Concepts, Measurements and Impact

Notes for an address

by

Selim Jahan

Deputy Director, Human Development Report Office

United Nations Development Programme

Madam Chairperson, Distinguished Guests, Participants, Ladies and Gentlemen: It gives me immense pleasure to be able to address this distinguished gathering. I would like to particularly thank Statistics Canada for giving me the opportunity to talk about the issue of gender equality and its measurements as reflected in the Human Development Reports. Needless to say, the topic is very close to my heart, both for personal as well as professional reasons.

Let me start with a personal note. I had the pleasure of sharing my life for the past twenty years with three exceptional ladies – my wife, of course, and my two teenage daughters. Over these years, I have constantly received their love, admiration and consideration. I could have been the victim of the tyranny of the majority, but that did not happen. Even though I represent one-fourth of our household, I have always been treated equally and fairly. So believe me, I know what gender equality is all about.

At a more professional level, I had the privilege of working on the *Human Development Report, 1995*, whose theme was gender and development. The basic message of the Report was development, if not engendered, is endangered. It is a simple statement, but with far-reaching implications. In my view, there are two loud implications and two silent implications.

The first loud implication is that the whole development process must be engendered. Often people talk of mainstreaming gender in the development process. But the problem with this approach is that current development paradigm itself is not gender-neutral. It has serious gender bias against women. If that is the case, then mainstreaming gender in the development process is not going to solve the problem. What we need is engendering the entire development paradigm.

The second loud implication is that development is endangered if it bypasses women. A development process cannot be sustainable if it ignores 50% of humanity. Sustainability does not mean environment only, it also requires institutional, political and social sustainability. A development process which is not sensitive to half of human kind can thus not be sustainable.

Coming to the two silent implications of the above statement, the first latent implication of it is that gender equality is not an issue of data, information or indicators only. We cannot understand the problem only by looking at numbers. Gender equality is more than that. At the household level, it reflects various power structures, at the community level, it is about gender roles of women and men; and at the state level, it is an issue of political economy. We should, therefore, not reduce it to a mechanical problem only.

Gender equality is central to the human development paradigm.

The second silent implication emphasizes that gender issues should not be treated as something at the end-of-the day business. Often while discussing developmental issues, we presume that we can take care of the gender issues after we have dealt with all the hard-core issues. There cannot be a Band-Aid approach to gender problems.

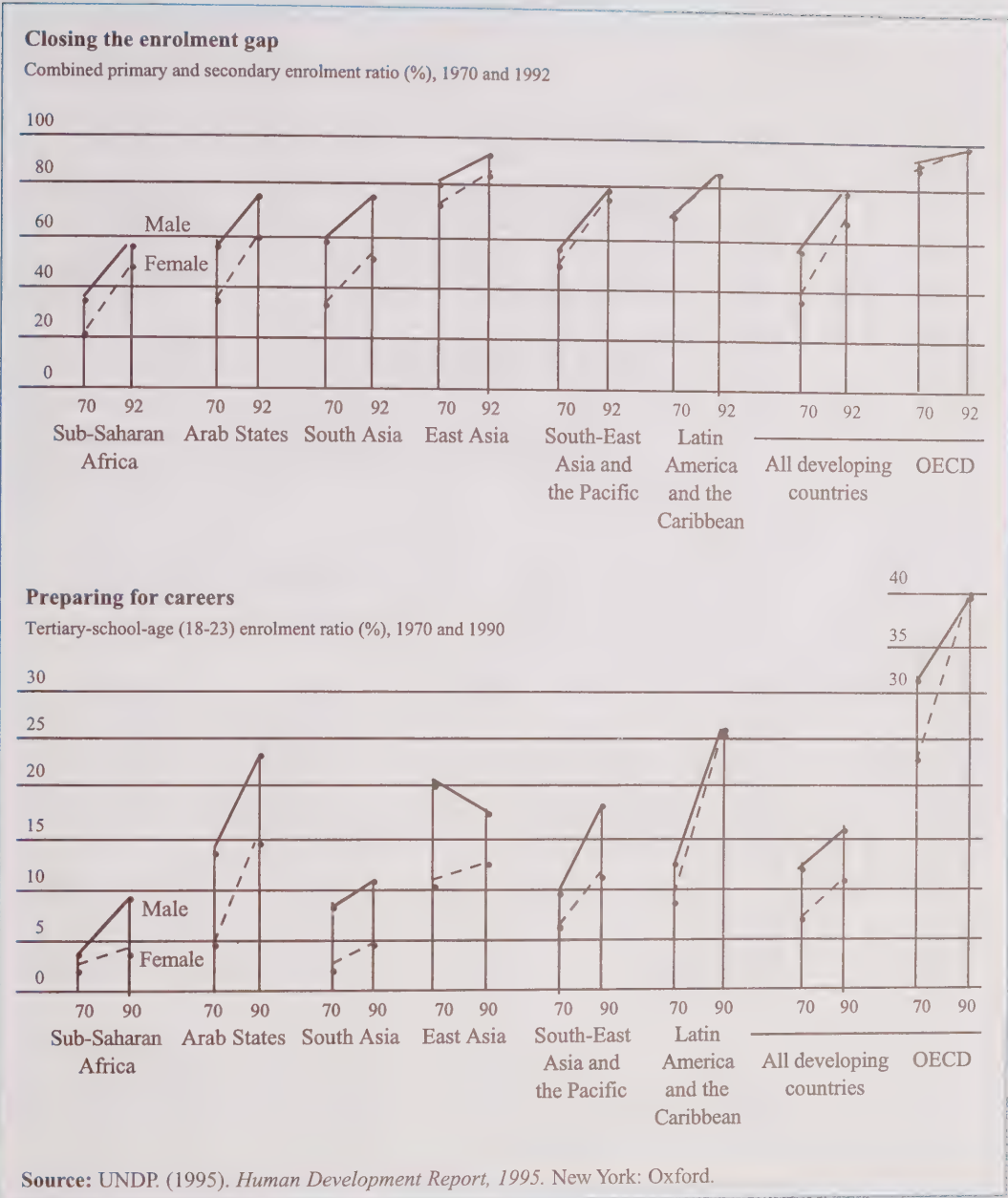
In dealing with the issue of gender equality from a human development perspective, let me focus on three issues:

- the philosophy of gender equality in the human development perspective;
- the gender equality indices in the Human Development Reports – their construction and the results with a special reference to Canada; and
- the impact of these exercises.

Taking the first issue first, gender equality is central to the human development paradigm. Human development is defined as a process of enlarging choices – economic, political, social, cultural. Some of the choices are more basic such as leading a long and healthy life, to be knowledgeable and to have a decent standard of living. But for the exercises of choices, basic and otherwise, one needs enhancement of capabilities and expansion of opportunities.

If now, choices of the half of the humanity are restricted, that is not human development. Over the years, considerable progress have been made in reducing female-male gaps in capabilities (Figure 1), yet significant gender gaps remain in areas of opportunities.

Figure 1: Women Move Ahead in Education and Health



Both the economic and the political space are still monopolized by men (Figure 2). With such gender disparity, human development would remain a myth. The Human Development Reports have consistently argued that human development requires regional, ethnic and rural-urban equity, but most importantly, gender equality. The *1997 Human Development Report on Poverty Eradication for Human Development* categorically stated that without gender equality, human poverty eradication is not possible.

Now going beyond philosophies of human development and gender equality, lots of work have been done on the issue of gender equality indicators and indices. When the first Human Development Report was initiated in 1990, it also introduced a composite index for measuring the average achievements in basic human development. It is called the Human Development Index (HDI). Remember that the concept of human development is broader than the measure. Even though the HDI measures average achievements in human capabilities, it did not represent gender disparities in achievements nor could it reflect significant gender gaps in opportunities.

The 1995 Human Development Report, introduced two gender-related composite indices – the Gender-related Development Index (GDI) and the Gender Empowerment Measure (GEM).

To capture these aspects of human development, the *1995 Human Development Report* introduced two gender-related composite indices – the Gender-Related Development Index (GDI) and the Gender Empowerment Measure (GEM) (Figure 3).

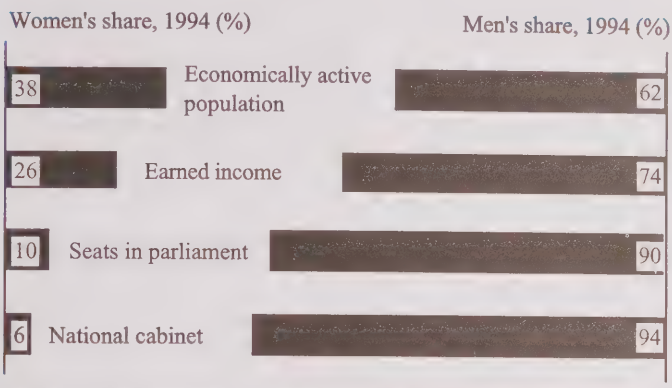
Two questions – “What is the difference between HDI and GDI?” and second, “Why did we need GEM?” On the first issue, GDI measures achievements in the same basic capabilities as the HDI does, but takes note of inequalities in achievements between women and men. Thus the GDI is the HDI adjusted for gender-disparities.

We need a separate measure for opportunities mainly because GDI measures only capabilities and secondly, the gender disparities in opportunities are enormous (Figure 4). One has to capture the disparities in opportunities.

Figure 5 lists the variables that have been included in the construction of the HDI, GDI and GEM. There have been two major criticisms of the GDI and the GEM. First, with regard to the GDI, it has been argued that the index is dominated by the income variable and it is constructed with weak data. Second, with regard to GEM, it has been complained to be top-down as women’s participation and empowerment have been defined in terms of their participation in labour markets, in administration and management, parliaments, cabinets etc. Questions have been raised as to “are not African women who spend time for fetching water and firewood, taking care of their families, participating”.

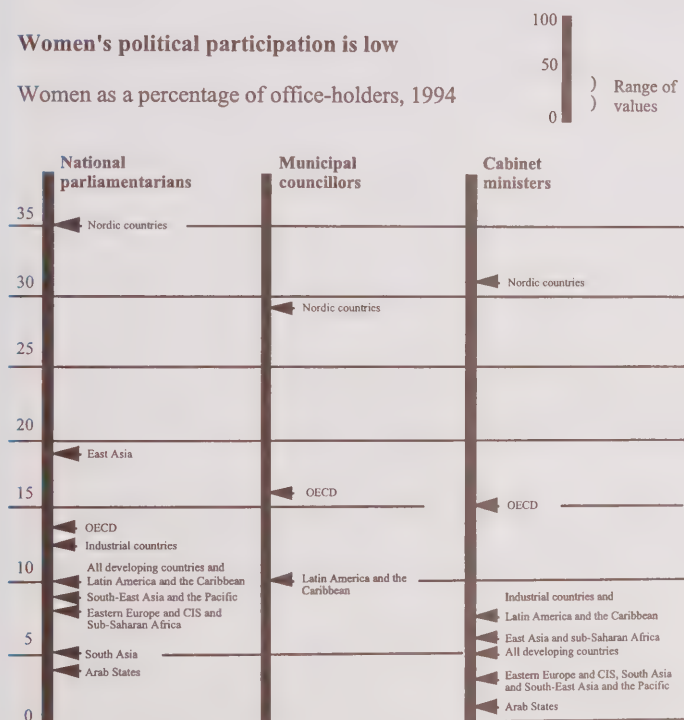
Figure 2: But Gaps Persist in Economic and Political Participation

In most respects, it is still an unequal world



Women's political participation is low

Women as a percentage of office-holders, 1994



Lower average wage for women

Country	Women's non-agricultural wage as % of men's
Tanzania	92.0
Viet Nam	91.5
Australia	90.8
Sri Lanka	89.8
Iceland	89.6
Sweden	89.0
Norway	86.0
Bahrain	86.0
Kenya	84.7
Colombia	84.7
Turkey	84.5
Jordan	83.5
Costa Rica	83.0
Denmark	82.6
Hungary	82.0
Mauritius	81.3
France	81.0
New Zealand	80.6
Italy	80.0
Egypt	79.5
Zambia	78.0
Greece	78.0
Poland	78.0
Austria	78.0
Finland	77.0
Netherlands	76.7
Portugal	76.0
Brazil	76.0
Paraguay	76.0
Germany	75.8
USA	75.0
Mexico	75.0
Belgium	74.5
Uruguay	74.5
Swaziland	73.0
Central African Rep.	72.6
Singapore	71.1
Spain	70.0
United Kingdom	69.7
Hong Kong	69.5
Ireland	69.0
Thailand	68.2
Switzerland	67.6
Luxembourg	65.2
Argentina	64.5
Ecuador	63.7
Canada	63.0
Bolivia	62.3
Philippines	60.8
Cyprus	60.8
Chile	60.5
Syrian Arab Rep.	60.0
China	59.4
Korea, Rep. of	53.5
Bangladesh	42.0
Average	74.9

Note: Data are for latest available year.

Source: UNDP. (1995). *Human Development Report, 1995*. New York: Oxford.

Figure 3: The HDI, the GDI and the GEM

HDI

The Human Development Index (HDI) measures the average achievement of a country in basic human capabilities. The HDI indicates whether people lead a long and healthy life, are educated and knowledgeable and enjoy a decent standard of living. The HDI examines the average condition of all people in a country: distributional inequalities for various groups of society have to be calculated separately.

GDI

The Gender-Related Development index (GDI) measures achievement in the same basic capabilities as the HDI does, but takes note of inequality in achievement between women and men. The methodology used imposes a penalty for inequality, such that the

GDI falls when the achievement levels of both women and men in a country go down or when the disparity between their achievements increases. The greater the gender disparity in basic capabilities, the lower a country's GDI compared with its HDI. The GDI is simply the HDI discounted, or adjusted downwards, for gender inequality.

GEM

The Gender Empowerment Measure (GEM) examines whether women and men are able to actively participate in economic and political life and take part in decision-making. While the GDI focuses on expansion of capabilities, the GEM is concerned with the use of those capabilities to take advantage of the opportunities of life.

Source: UNDP. (1995). *Human Development Report, 1995*. New York: Oxford.

While the GDI focuses on expansion of capabilities, the GEM is concerned with the use of these capabilities.

Figure 4

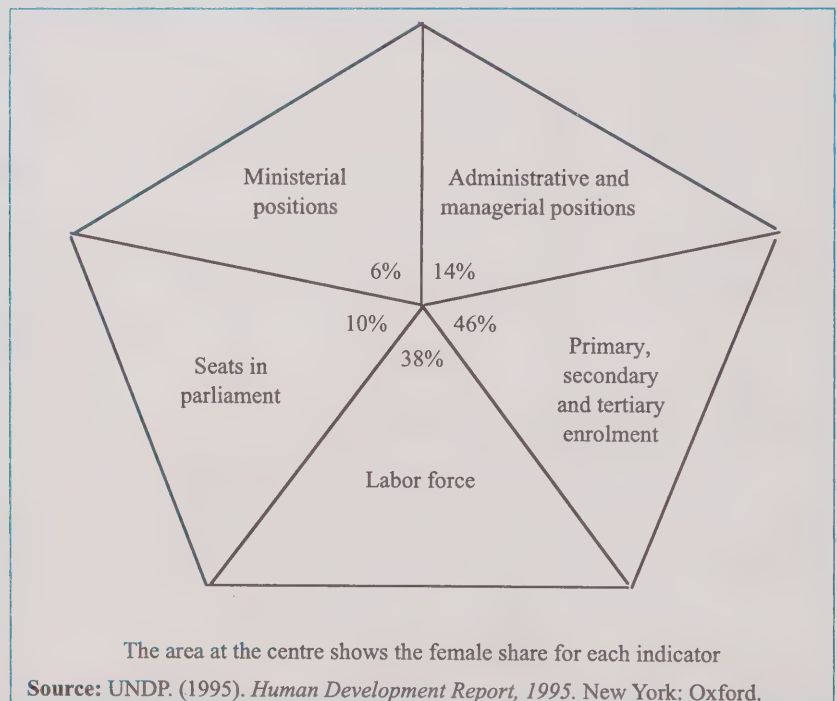


Figure 5: Measuring Progress in Gender Equality - The HDI the GDI and the GEM

HDI – Human Development Index

Measures achievement in basic capabilities that expand choices.
Indicates whether people:

- lead long and healthy life (life expectancy),
- are educated and knowledgeable (school enrollment),
- enjoy a decent standard of living (adjusted income).

GDI – Gender-Related Development Index

Genderized HDI – or HDI adjusted for gender inequality.

GEM – Gender Empowerment Measure

Measures participation in national, economic and political decision-making. Components include male and female shares of:

- parliamentary seats,
- administrator and managerial positions,
- professional and technical occupations,
- earned income.

Source: UNDP. (1995). *Human Development Report, 1995*. New York: Oxford.

Both these criticisms are well-taken. And we are taking appropriate measures to improve the situation. Income data that go into the GDI are being improved and information on other aspects of female participation, which are not so top-down, are being explored. But in spite of all their limitations, both GDI and GEM have been able to draw attention to issues of gender disparities in capabilities and opportunities and thus have contributed to policy debates and dialogues.

What do the GDI and GEM results reveal? Let us first look at individual results and then analyze the overall results. The GDI has been constructed for 146 countries and Canada tops the list. But a more in-depth analysis of the GDI results reveal that:

- No country in the world treats its women as well as its men. Gender disparity is a reality in every country and it is a question of degree

No country in the world treats its women as well as its men.

only. Sweden and Norway may treat their women relatively better than Bangladesh or Niger, but even in Sweden and Norway, there are gender disparities in capabilities.

- Significant progress has been made in reducing the gender gaps in capabilities, but still there is a long way to go.
- Gender equality is independent of high incomes or higher economic growth. Thus a country does not have to be rich or to be fast growing to treat its women fairly and equally. Rather, gender equality has been found to be correlated with multidimensional poverty.

Significant progress has been made in reducing gender gaps in capabilities.

The GEM has been constructed for 94 countries. Note that when we move from capabilities to opportunities, even the limited set of data are not available for the same number of countries for which capability data are available. It thus points to the need for collecting more and better data on the opportunities side of women. The GEM results reveal that:

- Some developing countries are ahead of industrial countries – Barbados ahead of Belgium, Trinidad and Tobago ahead of Italy and Portugal, Bahamas ahead of the United Kingdom, France behind Botswana and Japan behind China and Mexico. Thus providing opportunities to women does not depend on per capita income level.
- On the other hand, in countries where multidimensional poverty is high, the GEM values and rankings are low. Thus countries like Mauritania, Togo and Pakistan are at the bottom of the GEM League Table and all of these countries have a Human Poverty Index value of more than 45%.

With regard to the overall results, let us first look at the HDI, GDI and GEM values of various regions (Table 1). Three observations can be pertinent: first, for any region, as one moves from the HDI to the GDI and the GEM values, such values gradually drop. It indicates that in every region, when the average achievements in human capabilities are adjusted for gender-disparities, the region's position gets worse. Second, comparing the GDI and the GEM values, one finds that women's opportunities get shrunk vis-a-vis their capability building. Third, Asia with a per capita GNP of \$638, which is nearly one third of the per capita GNP of \$1,662 for the Arab States, has GDI and GEM values higher than those of the Arab States.

Table 1: Tabular Comparisons

	HDI	GDI	GEM	GNP per capita (US\$)
	1992	1992	1992	1992
World (104 countries)	0.6653	0.6050	0.3737	4,470
Developing countries (81 countries)	0.5939	0.5311	0.3225	924
Industrial countries (23 countries)	0.9168	0.8650	0.5542	21,352
Africa (27 countries)	0.4023	0.3771	0.2791	365
Arab (11 countries)	0.6464	0.5278	0.2491	1,662
Asia (17 countries)	0.6219	0.5610	0.3036	638
LAC (25 countries)	0.7509	0.6701	0.4181	2,799
Least Developed Countries (28 countries)	0.3862	0.3618	0.2671	356

Note: Calculated for 104 countries for which estimates of HDI, GDI and GEM are available.
Source: UNDP. (1995). *Human Development Report, 1995*. New York: Oxford.

Thus building women's capabilities and creating opportunities for them do not depend on income levels. Figure 6 summarizes all these issues more graphically and concludes that gender equality is an universal problem – both in poor and rich countries.

Looking at the situation in Canada now, it has ranked number 1 both in HDI and GDI in 1997 and in fact, it has topped the HDI list for the past few years. The HDI value for Canada is 0.960, its GDI value is 0.939 and the GEM value is 0.700.

For quite some time, Statistics Canada has been doing some great work with regard to indicators of gender equality. It is heartening to see that Canada has produced this wonderful and useful document on *Economic Gender Equality Indicators* under the auspices of the Federal-Provincial/Territorial Ministers Responsible for the Status of Women. It has got a tremendous amount of information and represents a good reference situation analysis with regard to gender equality. I have no doubt that this can be used as a model in other countries who are in the process of highlighting gender inequality in their own societies. Definitely, such a book in a country like Bangladesh would not be as comprehensive as in Canada, but it would be a good start and all the blanks in that book would serve the purpose of creating demand and pressure on people concerned to collect more data on gender-related indicators.

For quite some time, Statistics Canada has been doing some great work with regard to indicators of gender equality.

When I visited Canada in 1996, there was a big article in *The Globe and Mail* saying that more women are primary breadwinners in Canada. The write-up was on the basis of a study by Statistics Canada highlighting that nearly one in every four working wives earn more than their spouses and

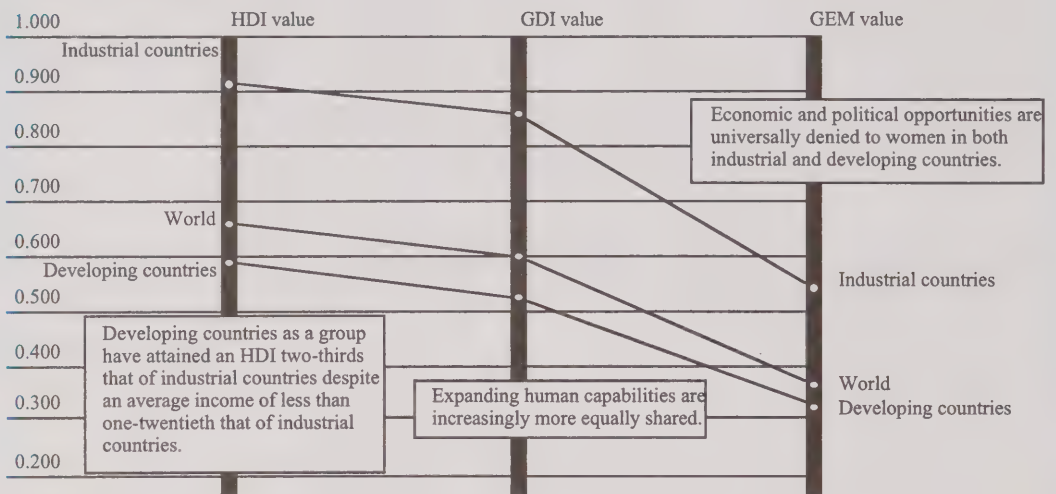
Figure 6: Gender Inequality is a Universal Problem, Both in Rich Countries and Poor

The Human Development Index (HDI) measures the average achievement of a country in basic human capabilities. The HDI indicates whether people lead a long and healthy life, are education and knowledgeable and enjoy a decent standard of living.

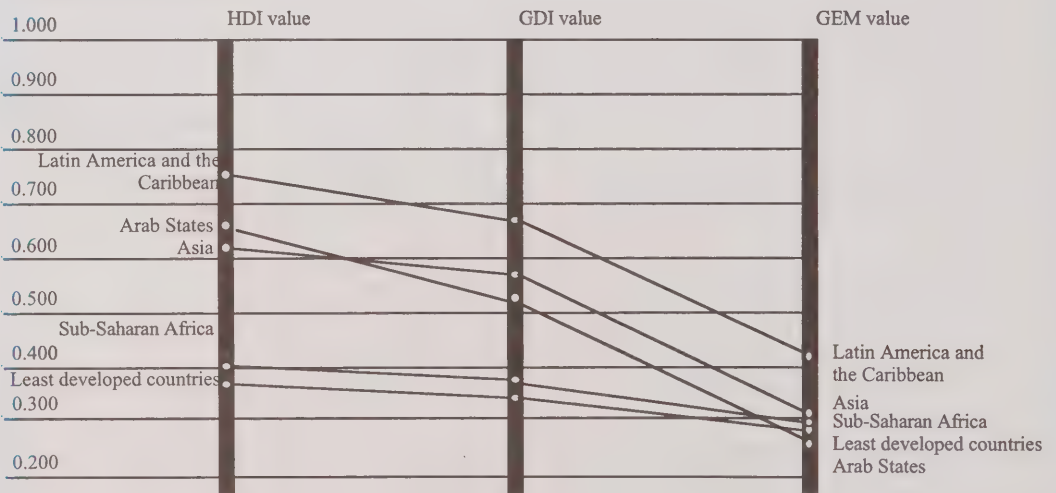
The Gender-Related Development Index (GDI) measures achievement in the same basic capabilities as the HDI does, but takes note of inequality in achievement between women and men.

The Gender Empowerment Measure (GEM) examines whether women and men are able to actively participate in economic and political life and take part in decision-making.

Global comparisons



Regional comparisons



some provide as high 75% of the family income. Such projection in the press removes a lot of misgivings about gender equality and creates a new kind of awareness.

On the issue of the impacts of various gender indices constructed by Human Development Reports, they have been used by institutions of civil society, women's movements and development activists for advocacy purposes. For example, such indicators have been taken seriously in different countries to put pressure on respective governments and in Japan, it has led to changes in laws. Similarly, the *Human Development Report, 1995* has helped repelling biased laws against domestic violence in many Latin American countries. The *Human Development Report, 1995* has been used as a major document in the Beijing Conference.

The Human Development Report, 1995 has been used as a major document in the Beijing Conference.

Second, in various countries, the GDI has been disaggregated to provide a mirror to the policy-makers. Such exercises have been carried out both in India and the Philippines (Tables 2 and 3). It is obvious from the Indian

Table 2: Gender-related Development Index for Indian States, 1991-92

GDI Rank	Gender-Related Development Index (GDI)	Share of earned income (%)		Life expectancy at birth (years) 1990-92		Adult literacy rate 1991 (%)	
		Females	Males	Females	Males	Females	Males
1 Kerala	0.565	12.4	87.6	74.4	68.8	80.6	91.7
2 Maharashtra	0.492	29.4	70.6	64.7	63.1	44.2	74.4
3 Gujarat	0.437	26.8	73.2	61.3	59.1	41.8	70.4
4 Himachal Pradesh	0.432	37.5	62.5	64.2	63.8	35.5	64.4
5 Punjab	0.424	5.9	94.1	67.5	65.4	41.8	60.5
6 Karnataka	0.417	25.4	74.6	63.6	60.0	37.7	65.3
7 Tamil Nadu	0.402	21.4	78.6	63.2	61.0	35.8	65.0
8 West Bengal	0.399	8.0	92.0	62.0	60.5	42.8	69.3
9 Andhra Pradesh	0.371	27.2	72.8	61.5	59.0	27.3	52.4
10 Haryana	0.370	7.0	93.0	63.6	62.2	27.0	64.3
11 Assam	0.347	23.7	76.3	53.8	54.8	33.9	62.4
12 Orissa	0.329	19.1	80.9	54.8	55.9	29.0	62.5
13 Madhya Pradesh	0.312	25.4	74.6	53.5	54.1	24.3	56.6
14 Rajasthan	0.309	23.0	77.0	57.8	57.6	17.5	52.7
15 Bihar	0.306	21.8	78.2	58.3	60.4	18.2	55.3
16 Uttar Pradesh	0.293	12.9	87.1	54.6	56.8	20.6	53.6
INDIA	0.388	23.2	76.8	59.4	59.0	33.9	62.4

Source: Shira Kumar, A.K. (1996). *UNDP's Gender-Related Development Index: A Comparison for Indian States*. UNICEF: Delhi.

Table 3: Gender Development Indices (1990-1994)

	GDI		HDI		Gender disparity (%)	
	1990	1994	1990	1994	1990	1994
NCR	0.467	0.449	0.944	0.925	50.5	51.4
I – LLCOS	0.228	0.230	0.592	0.630	61.4	63.5
II – Cagayan Valley	0.182	0.231	0.560	0.640	67.4	63.9
III – Central Luzon	0.266	0.271	0.695	0.709	61.7	61.9
IV – Southern Tagalog	0.257	0.283	0.654	0.714	60.7	60.4
V – Bicol	0.165	0.193	0.488	0.570	66.1	66.0
VI – Western Visayas	0.183	0.207	0.527	0.594	65.3	65.2
VII – Central Visayas	0.184	0.201	0.528	0.580	65.1	65.3
VIII – Eastern Visayas	0.171	0.182	0.473	0.538	63.7	66.2
IX – Western Mindanao	0.119	0.104	0.458	0.524	74.0	80.2
X – Northern Mindanao	0.179	0.195	0.531	0.578	66.4	66.3
XI – Southern Mindanao	0.205	0.239	0.571	0.621	64.2	61.5
XII – Central Mindanao	0.125	0.157	0.479	0.556	73.9	71.8
<p>Note: The index of gender disparity is obtained by taking the percentage difference between the HDI and the GDI, i.e. $100 \times (\text{HDI} - \text{GDI})/\text{HDI}$.</p> <p>Source: UNDP (1994). <i>Philippine Human Development Report, 1994</i>. UNDP: Manila.</p>						

case that women in Bihar are doubly deprived, first because they live in a more backward region and secondly because they are women. A similar case can be made for women from West Mindanao, in the case of the Philippines.

Third, both GDI and GEM are being explored more in academic researches and queries. More innovative experiments on these two indices are being pursued at the International Social Studies Centre in the Hague. Students are preparing dissertations on these indices. It can thus be hoped that in future we shall be able to refine these indices further.

Fourth, both GDI and GEM have contributed to policy debates and dialogues at the national and the sub-national levels. Disaggregation of these indices have provided some guidance as to where to redirect resources in order to deal both with deprivations and gender-disparities.

The *Human Development Report, 1995* also made a number of policy recommendations for gender equality which have been taken quite seriously by various national governments (Figure 7).

Both GDI and GEM have contributed to policy debates and dialogues at the national and the sub-national levels.

Figure 7: Five Point Strategy for Gender Equality

- Legal equality – within the next 10 years:
 - unconditional ratification of CEDAW by 90 countries,
 - international NGO – WWW – to report on legal discrimination,
 - pools of legal professionals,
 - legal literacy campaigns,
 - legal ombudswomen,
 - violence against as a weapon of war to be recognized as a war crime,
 - UN monitoring of CEDAW.
- Changes in institutional arrangements for more choices in the workplace.
- 30% threshold, a minimum women's share in political and economic decision making at the national level.
- Gender equality in education, health and credit including control of fertility.
- National and international resources for empowerment of women.

Source: UNDP. (1995). *Human Development Report, 1995*. New York: Oxford.

Let me now make three concluding remarks with regard to gender equality. First, gender equality does not mean that people have to change their identity or women have to be like men. What it means is that, irrespective of their sex, people must have equal access to capabilities and opportunities and no one should be discriminated on the basis of her sex.

Second, gender equality does not mean that there should be antagonism between women and men. Gender equality does not imply changing the roles of women only, but it cannot be achieved without changing the roles of men too.

Third, gender equality should not be a blanket mechanical issue irrespective of the location and position of women. My grandmother in a village in Bangladesh, my mother in a small city in Bangladesh, my sister in the capital city of Bangladesh, my wife in New York and my daughter in Montreal have some common issues, but let us also recognize that they have different sets of problems. Gender equality should build on the commonalties, but it should also recognize the differences.

Gender equality does not mean that there should be antagonism between women and men.

Last but not least, human development is all about choices. The kind of choices that we make today with regard to girls versus boys, with regard to women versus men would determine what sort of world we shall have tomorrow. The kinds of choices we make today will determine the lives of our children and grandchildren. Let us be wise enough to make the right kinds of choices, let us be prudent enough to set our priorities right, and let us be bold enough to do what is needed to be done. Let us not forget that in the ultimate analysis, human destiny is a choice, and not a chance.

Thank you all.

Thematic Summary of Workshop and Plenary Session Discussions¹

Key Recommendations

During the workshops that were held over the two days, participants developed proposals and recommendations to advance developments in the area of gender equality. Although the recommendations were not submitted to the plenary sessions for formal debate and amendment, all were read at the plenary sessions by the workshop leaders. The following is a selection among the recommendations. These and additional recommendations may be found below within the contexts of the themes to which they apply.

- Given the interest that is stimulated by the availability, usage and promotion of gender-based analysis, as well as the desire to obtain and share related statistical data, and experience across many sectors, it is proposed that Status of Women Canada and Statistics Canada form an ad hoc working group comprised of persons present at the symposium. This ad hoc working group will deliberate to develop a plan of action designed to assure concrete results from the symposium with the goal of facilitating the exchange of information, expertise and resources among non-government organizations, government officials, and politicians. This group will also work towards the goal of circulating information about best practices, to promote the emergence of appropriate strategies, and to raise the awareness of gender issues among bureaucrats, politicians and the public with due attention to the implied funding requirements.
- With the goal of facilitating improved access to the data and related information concerning the equality of the sexes for the purposes of

¹ Although the workshops had distinct themes, the themes had over-lapping contents. As a result, there were many recurrences of ideas and recommendations (with variations in wording, as one might expect) among the workshops. Furthermore, the reports from workshops to the plenary sessions were designed to promote linkages of related ideas coming from diverse sources. As a result, many statements in this thematic summary use wording that is not identical with what one would find in transcripts of the actual workshop summaries. However, workshop leaders were asked to review this text with a view to identifying serious departures from the intents of the main ideas and recommendations that developed in their groups.

research and participation in the policy process, Statistics Canada should take measures to further democratize access to data, and to reduce the cost of access to its data banks. This would be done in collaboration with its partners in the collection and dissemination of data. These measures should be informed by consultations involving diverse groups, including women's organizations and aboriginal groups, to improve its understanding of the needs of these groups for information that is relevant to gender-based analysis. Results of these consultations should be published.

- Training of providers and users of data is important. Politicians and senior policy advisors, in particular, need training about gender sensitivity, the uses of gender indicators and gender-based analysis. This training is needed if gender-based analysis is to become integrated into decision-making within government.
- Statistics Canada should include NGOs in its data liberation initiative. This will help the non-government sector to become more well informed users of data and to play a more prominent role in interpreting findings.
- Statistics Canada should take steps to ensure that gender-based analysis is integrated into its on-going statistical activities.
- Proposals for research submitted by academics should, where appropriate, be required to give evidence that the work will include relevant gender-based analysis.
- Builders of indicators should include a gender dimension in their work, or clearly specify why they have not done so. For example, lack of data or demonstration that gender-based analysis makes no difference to the behaviour of the indicator.

Improving Gender-Based Analysis

Elements of Gender-Based Analysis

Governments in Canada and around the world have recognized the importance of gender-based analysis as a tool for informed policy-making. In conducting gender-based analysis, we need to consider the following: what is the issue/problem, who is affected, what are the appropriate reference groups, how long will the effect last, what are the relevant data sources and their strengths and deficiencies, and what strategies are useful to ensure the best use of existing data and to address deficiencies when alternative policy options are considered?

Progress in Implementing Gender-Based Analysis

There is still a large number of people who are skeptical of the value of doing gender-based analysis, and among them is a subset comprised of persons who believe that inequalities pertaining to women's status have been solved. Evidence is needed to show them the nature and extent of gender gaps, to test assumptions and to demonstrate how policy can be improved by taking gender differences and similarities into account. Even where key people in an organization are persuaded that gender-based analysis should be done, there remains a large step involving training and building of capacity to carry out this analysis.

Examples of Provincial Initiatives to Advance Gender-Based Analysis

Nova Scotia is engaged in developing indicators of economic gender equality, as well as in gender-based analysis. The work is done first with ministries that are interested in pursuing such matters.

Saskatchewan has worked on the task of stimulating the use of gender-based analysis to develop information that influences the formation of policies.

Québec has formed an inter-ministerial committee concerning gender-based analysis, which includes eight ministries and organizations, among them “le ministère du Conseil exécutif” and “le Secrétariat du Conseil du trésor”. The latter two are co-leaders of the project along with “le Secrétariat à la condition féminine”. The committee has a three-year mandate to develop a set of mechanisms and tools with pilot Ministries in the economic and social fields. The first strategy is to avoid a “wall to wall” approach to the government. Instead, the strategy involves working with a small set of Ministries and selected policies within those Ministries, who will guide the development of the necessary instruments.

Determinants of Future Success in Implementing Gender-Based Analysis

There are several factors that will influence the future extent of use of gender-based analysis. These factors include political activism designed to create the political will to use gender-based analysis, education and promotion of awareness among the larger public, and success in promoting the concept that gender-based analysis is not designed to be used only to serve women's interests. Other influential factors involve the production of more gender-based analysis guides and training tools, case studies that are usable in both the public and private sectors, as well as the availability of specific plans and resources for carrying out gender-based analysis within and outside of government.

Discussions in two workshops lead to lists of fields where gender-based analysis is needed or would be useful. These lists are not reproduced here because valid arguments in at least two speeches make it clear that it is, in fact, quite difficult to pinpoint economic and social policy concerns where opportunities for useful gender-based analysis would not arise. The surprise, as one speaker pointed out, is how far senior policy analysts can go in their thinking with little apparent attention to the centrality of gender-related issues in our society. In short, lack of scope (intrinsic to policy concerns) for using gender-based analysis will not be a factor in helping to determine future success in implementing gender-based analysis.

Partnering with Policy Analysts

In attempting to increase the gender sensitivity of policy analysts, focus should be placed upon working along with them in specific projects. This includes involving the analysts in the creation of tools for gender-based analysis, rather than first developing the tools and then trying to issue prescriptions concerning their use. The tools in question include methodological ones as well as training tools. This approach of emphasizing partnerships with policy analysts early in the creation of tools will increase the chances that the positive values of gender-based analysis will be perceived and pursued by those analysts. (N.B. Due to its significance, this recommendation can also be found in the section entitled “Building Alliances to Improve Effectiveness”.)

Recommendations to Statistics Canada

Statistics Canada should take steps to ensure that gender-based analysis is integrated into its on-going statistical activities.

Recommendations to Organizations that are Funding Academic Research

Proposals for research submitted by academics should, where appropriate, be required to give evidence that the work will include relevant gender-based analysis.

Recommendations to the Designers of Social and Economic Indicators

Builders of indicators should include a gender dimension in their work, or clearly specify why they have not done so. For example, lack of data or demonstration that gender-based analysis makes no difference to the behaviour of the indicator.

Improving Access to Needed Data and the Usage of Available Data

Citizens' Entitlement to Improved Access to Statistics Canada Data at No Charge

A distinction was made between “customers” and “citizens” in thinking about users of statistical data. Some data are available to citizens at no charge; but are these provisions adequate to promote an acceptable percentage of well-informed citizenry in Canada? There is a problem when statistical agencies treat people as revenue sources through “user pay” principles, while citizens are expected to make informed representations of their views in political debates. Also non-government organizations (NGOs), acting as associations of citizens that are vital to civil society, will become more effective users of Statistics Canada data if easier access routes to data and lowered costs of using those routes are achieved.

The United States Bureau of Labor has developed a facility that allows data users to create cross-tabulations from microdata bases by using their World Wide Web browsers. Users simply make choices among a sequence of menus, and the tabulations are then generated and returned to the users.

Make Gender Equality Indicators More Understandable Among a Wide Variety of Stakeholders

For gender equality indicators to be better used in policy-making they need to be made more understandable among all groups involved, and the user-friendliness of their presentation should be continued and improved.

The needs of the groups that wish to use information should be carefully considered when designing the delivery of information to them. The relevant groups include policy analysts, non-government organizations and decision-makers, whose information requirements may differ. In this connection, there should be more discussion about what are various stakeholders' information needs, and how they can be assisted to use the available data more effectively.

Improved representation of municipal-level organizations is needed in discussions and work concerning gender equality indicators and gender-based analysis.

This widened participation in indicator development is helpful for another reason. Indicators are designed to measure a gap between the desired level or state and current conditions. It is preferable if the view of the desired

state can be developed in a fully participatory fashion. This will involve the achievement of more effective links among NGOs, policy-makers, statisticians, and researchers.

With the help of these strengthened links, the development of gender equality indicators should be accompanied by specific plans to stimulate the use of such indicators. Such plans would be laid in the light of consideration of barriers to that use. As an instance of these barriers, NGOs highlighted their lack of resources for carrying out data analysis, as well as difficulties in gaining access to data, and in developing knowledge about data sources.

To be More Useful, Gender Equality Indicators Need to be More Comprehensive, and Should Include Analysis

There is a need for a wider range of subjects to be covered. These subjects should include areas such as health, violence, the sharing of power in society, and sharing of income and wealth within households. This implies the creation of indicators for key population sub-groups, such as older persons and ethnic groups, as well as greater attention to diversity among men and among women.

Furthermore, the analysis of patterns shown in the gender equality indicators needs to be done in specific regions. Caution is needed in generalizing to the situations of rural and ‘periphery’ communities from data that are dominated by urban populations. Both the questions asked in gathering data, and the analyses eventually done with the data, need to be sensitive to the special situations of these smaller communities. When developing data bases and gender equality indicators for use in analysis, it is necessary to present data for different kinds of community in ways that reflect the social contexts of each kind, paying attention to variations in subjective as well as objective variables and in cultural diversity.

Case Studies of the Gender Equality Indicators and Other Gender-Related Data Are Needed

A case study book on the *uses* of gender equality indicators and other gender-related data would illustrate how people have used such data. This would help others improve their effectiveness in the applications of the data. The case study book could be supported by a research guide that is gender sensitive, and deals with the nuances of gender-based analysis that goes beyond simply breaking down the data by sex.

Recommendations to Statistics Canada

Statistics Canada should include NGOs in its data liberation initiative. This will help the non-governmental sector to become more well informed users of data and to play a more prominent role in interpreting findings.

With the goal of facilitating improved access to the data and related information concerning the equality of the sexes for the purposes of research and participation in the policy process, Statistics Canada should take measures to further democratize access to data, and to reduce the cost of access to its data banks. This would be done in collaboration with its partners in the collection and dissemination of data.

These measures should be informed by consultations involving diverse groups, including women's organizations and aboriginal groups, to improve its understanding of the needs of these groups for information that is relevant to gender-based analysis. Results of these consultations should be published.

In the process of improving the accessibility of data to various user groups, Statistics Canada should allow each group to decide what level of data reliability is acceptable for its purposes.

Building Alliances to Improve Effectiveness

Partnering Elected Officials and Researchers

Improvement is needed in alliances that are important for advancing the use of gender-based analysis; for example alliances among elected officials and researchers.

Partnering with Policy Analysts

In attempting to increase the gender sensitivity of policy analysts, focus should be placed upon working along with them in specific projects. This includes involving the analysts in the creation of tools for gender-based analysis, rather than first developing the tools and then trying to issue prescriptions concerning their use. The tools in question include methodological ones as well as training tools. This approach of emphasizing partnerships with policy analysts early in the creation of tools will increase the chances that the positive values of gender-based analysis will be perceived and pursued by those analysts.

Partnering with Non-Government Organizations

Non-government organizations are important foundations of a viable civil society. They need resources to allow them to continue their work. We recognize and support the critical role of non government organizations and other interested parties in the utilization and dissemination of gender-based analysis

There is a large reserve of relevant knowledge and experience in non-government organizations. There is a need to evolve mechanisms for periodic consultations with them in order to allow them to use that knowledge and experience to influence decisions that affect large numbers of Canadians and the well being of Canadian communities. The quality of their inputs to these consultative processes will be enriched to a worthwhile degree if systematic steps are taken to build up their capacity to access and use statistical information.

Toward this end, core funding for women's groups needs to be maintained, since the groups cannot function without it. The knowledge that is available from these groups cannot be brought to bear in the development of policies designed to solve problems unless this support is maintained.

Recommendation to Statistics Canada

The work of Statistics Canada should accord greater priority to the information needs of non-government organizations.

Multi-Sector Partnering Including Community-Based Groups

Networks need to be built across all relevant Ministries, and there is a need to strengthen links among policy-makers, data collectors, academics and community-based groups. Strengthened links will improve activists' understanding of the policy process, so as to increase the effectiveness of inter-group co-operation.

Partnerships with community leaders can be important in stimulating use of information about gender equality. Effective partnerships are those that are nurtured early in the process of developing indicator projects.

Recommendations to Statistics Canada and Status of Women Canada

Given the interest that is stimulated by the availability, usage and promotion of gender-based analysis, as well as the desire to obtain and share related statistical data, and experience across many sectors, it is proposed that Status of Women Canada and Statistics Canada form an ad hoc working group comprised of persons present at the symposium. This ad hoc working group will deliberate to develop a plan of action designed to assure concrete results from the symposium with the goal of facilitating the exchange of information, expertise and resources among non-government organizations, government officials, and politicians. This group will also work towards the goal of circulating information about best practices, to promote the emergence of appropriate strategies, and to raise the awareness of gender issues among bureaucrats, politicians and the public with due attention to the implied funding requirements.

The ad hoc group should also contribute toward developing an accountability framework on gender-based analysis for use in departments.

Enhancing the Capacity to Produce Policy-Relevant Information Based on Statistics

Qualitative data are needed to complement and balance the current heavy reliance on quantitative data. For example, valuable insights could be obtained by complementing the General Social Surveys with in-depth interviews of a subset of the respondents.

The development of social indicators would be enhanced by the use of specific tools for incorporating qualitative information, utilizing feedback from people being measured, and validating the indicators. These tools would facilitate meeting such challenges that of representing accurately the realities of women facing violence and insecurity. The gathering of such data may mean supplementing surveys with additional methods of gathering data.

An effort should be made to develop a formulation of a prototype federal budget that incorporates gender-sensitivity in the development process. Even a crude effort might serve to stimulate the process of improving gender-sensitivity in official budgets.

Revealing the Paradigms and Models Implicit in Social and Economic Indicators

The configuration of institutions and how they behave is important, and models differ in their orientation toward the reflection of institutional behaviors.

Current projects of indicator development tend to be dominated by the values of the market system, which emphasize transactions in marketable resources rather than on those that deal with relationships. Consequently, these projects tend to exclude concern with gender-related issues and with women's realities.

Training of Data Users

Training of providers and users of data is important. Politicians and senior policy advisors, in particular, need training about gender sensitivity, the uses of gender indicators and gender-based analysis. This training is needed if gender-based analysis is to become integrated into decision-making within government.

The efforts of Statistics Sweden to provide senior elected officials with training in gender-sensitivity and use of related statistics were noted with approval.

Efforts are needed to build the media's awareness of the gender dimension of policies and programs. Supplying the media with 'report cards' on relevant aspects of government performance is one way of building that awareness.

Harnessing the Numbers: Potential Use of Gender Equality Indicators for the Performance, Measurement and Promotion of Gender-Based Analysis of Public Policy

Background paper

by

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Introduction

In *Setting the Stage for the Next Century: The Federal Plan for Gender Equality*, the Government of Canada committed itself to “ensuring that all future legislation and policies include, where appropriate, an analysis of the potential for different impacts on women and men” and to “the development of indicators to assess progress made toward gender equality” (Status of Women Canada 1995).

In 1997, the Federal-Provincial/Territorial Ministers Responsible for the Status of Women released *Economic Gender Equality Indicators*. This paper discusses ideas on how those indicators can be used for gender-based analysis in public policy-making.

These indicators did not appear out of nowhere. They emerge from the context of the social indicators movement, criticisms of statistics and indicators from a gender perspective, from the pioneering work on gender indicators and gender analysis in the international development field, and from the need for tools to take gender into account when developing policy.

The effort to “humanize” economic indicators is a response to the fact that the GDP and interest rates do not tell the full story about people's lives and realities. In fact, in 1993, when the American economy grew by 3.1%, social indicators¹ declined in the same year by 1.9% (Miringoff et al. 1996). By the same token, an upswing in the traditional economic indicators cannot necessarily be equated with better opportunities for women.

The effort to “humanize” economic indicators is a response to the fact that the GDP and interest rates do not tell the full story about people's lives and realities.

The development of gender equality indicators rests on a history decades-long of dissatisfaction with traditional measures in portraying the realities of women. Oakley and Oakley (1979) and others criticised the gender bias in official statistics, in the areas chosen for statistical analysis, concepts employed to organize the statistics, the collection and processing of data, and the presentation of the statistics. Marilyn Waring (1988) challenged our ideas of economic value when she attacked the United Nations System of National Accounts for not including women's unpaid work, and counting environmental degradation as measures of value and production.

¹ Social indicators characterized by the rising number of children in poverty, rates of child abuse and teen suicide, serious crime, access to health care, access to affordable housing and a growing gap between rich and poor.

Gender indicators have long been used in the international development field. The Canadian International Development Agency (CIDA) develops gender sensitive indicators as a key feature of results-based management, to measure the effectiveness of the Women in Development and Gender Equity Policy at the program and project level (CIDA 1996).

The United Nations Development Programme's Gender Development Index (GDI) takes the UNDP's standard Human Development Index (HDI) measures of life expectancy, educational attainment and income, and compares women and men for each of these measures for each country. As well, the UN uses gender differences in income, professional, technical, managerial and administrative jobs, and percentage of parliamentary seats held by women and men to calculate its Gender Empowerment Measure (GEM) for each country (UNDP, 1995). Young et al. (1994) developed 21 gender inequality indicators based on the United Nations Women's Statistics and Indicators (WISTAT). The Commonwealth Secretariat is developing a Gender Management System Handbook and Resource Kit which will include information on gender-sensitive indicators for gender mainstreaming within government departments (Commonwealth Secretariat 1997).

Canada has made its contribution to this field of gender indicators with the *Economic Gender Equality Indicators* released in 1997. In this paper, the three primary potential applications of these indicators will be explored:

- As an **input**: using the indicators to inform gender-based analysis;
- As a **results** measure: using the indicators to measure the success of gender-based analysis;
- To raise **awareness**: using the indicators as a tool to sensitize policy-makers and the public to the gender gap in order to promote the need for gender-based analysis.

Definitions

Gender-based analysis “takes into account social and economic differences between women and men at every stage of policy development to ensure that:

- the potential differential impacts of policies, programs and legislation on women and men are discovered, and
- existing and proposed policies have intended and equitable results for women and men, boys and girls.” (Morris 1997a)

“An **indicator** is normally defined as summarising a large amount of information in a single figure in such a way as to give an indication of change over time.” (CIDA 1996)

A **social indicator** is a “statistical series, and all other forms of evidence...that enable us to assess where we stand and are going with respect to values and goals...” (Bauer 1966) “Social indicators...illuminate trends, comparative dissimilarities and patterns of inequality.” (Vogel 1997) The unemployment rate is considered a social indicator. The economic gender equality indicators are social indicators, in that they measure progress over time toward the goal of gender equality, and highlight disparities and inequality between women and men.

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For the purposes of this paper, **results-based indicators** will refer to indicators which measure the performance of broad policy goals, whereas **outcome indicators** will refer to measuring the performance of a specific program.

Although the economic gender equality indicators are not project-oriented and are useful primarily in developing, measuring and raising awareness of broader policies and potential policies, I have found the long-standing work on gender indicators in the international development field of particular interest and value, and will draw on this excellent work.

Issues and Questions

Input

The economic gender equality indicators can inform gender-based analysis, that is, can be used in the development of policies, programs and legislation which take into account their potential impact on women and men. The following are questions to consider:

- How can the gender equality indicators best inform gender-based analysis?

Providing Information

The indicators provide background data for Canada on women's and men's paid work, unpaid work, total workload, paid and unpaid work patterns by household type, total income, after-tax income, total earnings, university degrees granted, training participation, training hours, and occupational return on education. In addition, most of the data are also provided by province and territory.

Establishing Goals and Priorities

One can use the indicators as a departure point for policy, for example, choosing an index which shows a high degree of inequality, and concentrate policy efforts in that area.

Identifying Problems

Indicators can serve as an “early warning system” of a widening inequality gap which may otherwise go unnoticed.

Some issues emerge from the indicators that are not the focus of current policy, such as the fact that the proportion of women receiving degrees in female-dominated fields is actually increasing, which may suggest men are not entering these fields. In this sense, the indicators can serve as an “early warning system” of a widening inequality gap which may otherwise go unnoticed.

Anticipating Effects

The indicators can be used as a focus for thinking ahead to the policy result or program outcome. One can think about whether a policy might have an impact on any of the gender equality indices. The drawback is that a program that is not broad-based or a policy for a certain target group may not affect any index because of the sheer small numbers of people involved, even though the policy or program may make a great difference in the lives of hundreds of women and their families.

Shaping Solutions

Recognizing women's unpaid workload, for example, may be helpful in developing, strengthening or prioritizing measures such as a caregiver tax credit, home care and respite care.

Building it Into the Evaluation Process

Relevant economic gender equality indicators can be built into proposed government policies, programs and legislation as one of the evaluation measures.

- Can economic gender equality indicators be used as stand-alone tools, or what other tools and resources does one need to perform gender-based analysis?

As a stand-alone tool, the economic gender equality indicators tell you what is going on in certain selected areas of study, but they do not in themselves tell you why. A user of the indicators still needs the background knowledge of gender and public policy in order to understand and interpret the indicators. They are not a “quick fix”.

The appropriate use of the indicators in gender-based analysis is alongside other qualitative and quantitative data to form a full picture of women and men's economic situation.

- Can the indicators be used for simulation models, i.e. for running through proposed policies to gauge their impact on women and men?

Economic simulation models are often used in policy-making, particularly for proposed tax and financial policies. Gender can be incorporated into these models, depending on whether the data being used is disaggregated by gender, and we can see whether women or men “win” or “lose” in a policy.

For example, a gender impact analysis of Employment Insurance legislation found that the revamped program would result in women's total insurance benefits decreasing by 7% and men's by 10% by 2001-02 (HRDC 1996). These data do not tell us anything about the relative context of men and women to begin with. This is where economic gender equality indicators can be useful. For each simulation, we can also add as a factor what effect the policy might have on the relevant indicators, in this case perhaps the total income indicator. Another example is, would a child tax benefit increase affect the after-tax income disparity between men and women? It goes beyond a simple analysis of who will benefit most from a particular policy, to measure in advance the kind of impact it might have on bringing women and men in Canada toward economic equality.

- What are the limitations of the indicators for use in gender-based analysis?

Lack of Familiarity

We are all acquainted with certain indicators, such as the GDP and the unemployment rate. The introduction of a new set of indicators, especially complex ones, may lead to some initial confusion as to what they mean and how to use them. For example, take the index of females to males in female-dominated occupations (F-P/T Ministers 1997: 38). We can see from the indicator that the proportion of women to men in female-dominated occupations has increased, but does this tell us fewer men are going into these occupations, or even more women are entering these fields? Of the women who are entering these fields, have they considered entering male-dominated or neutral occupations but have instead chosen female-dominated ones, or are they women who would once not have planned on a “professional” career at all, but rather remained sales clerks,

Gender impact analysis goes beyond a simple analysis of who will benefit most from a particular policy, to measure in advance the kind of impact it might have on bringing women and men in Canada toward economic equality.

secretaries or homemakers? Therefore, is the increase in the proportion of women in these fields a positive or negative sign? And what can we do with this information?

One cardinal rule is that “Indicators should be easy to use and understand.” (CIDA 1996) If they are not, special efforts may be necessary to explain them.

Predefined Priorities

If economic gender equality indicators are used as a starting point, rather than as one of many inputs, this may result in gearing policies toward affecting the indicators. A potential problem with this is that there may be gaps in the indicators, and the structural goals of the indicators may not be what women and men want, nor what is needed.

Missing Information

Most of these indices can be used as a starting point, but must be supplemented with other information in order to form a complete picture. The Training Participation Index, for example, does not examine need or context. Other information is also necessary, such as the quality or type of training. For the purposes of the index, a two-hour computer course to learn the basics of Microsoft Word may be given the same status as one year's paid academic leave to do an MBA. Even the Training Time Index, which compares the number of hours spent in training by women relative to men does not take into account the quality or type of training, nor the issue of who may need the most training, an issue that will be referred to again later in the paper. That is not to say the indices are not valuable. It is to say that anyone wanting to examine the training issue in further detail will need additional information.

Results

There is increasing interest by governments to use indicators to measure their performance. These are not necessarily indicators that are tied to a specific program, such as how many clients in a certain training program went on to get jobs. They begin with targets in areas such as teen pregnancy, unemployment, pollution levels in the air or water, and then structure policy to affect those indicators in the desired directions.

The City of Jacksonville, Florida has developed comprehensive indicators touching on education, economy, public safety, natural environment, health, the social environment, government and politics, culture and

recreation and mobility, with 140 people on nine task forces, one for each set of indicators. They use a gold star and red flag system to mark improvements and dangerous trends (Andrews 1996).

This has led to action taken in areas in which the indicators fall short of the target. For example, a too-high pollution indicator for the local river prompted a push to clean the river, involving the creation of a water quality committee and a telephone hotline to report contamination. One indicator raised public awareness about an unsatisfactory school drop-out rate, which led to a new program credited with improving the retention rate in selected schools (Andrews 1996). In essence, unsatisfactory indicators are taken as unsatisfactory current government and community responses, and action is taken to improve policy and programs in the target area.

Other examples of jurisdictions using indicators in a similar manner are Oregon, Minnesota, the Sustainable Seattle project and Upper Valley 2001 in the Upper Connecticut River Valley. In Canada, the Government of Alberta releases annual performance reports with broad targets such as striving to be the province with the lowest percentage of people reporting a fair or poor health status (Alberta 1997). Many social indicators are released at various levels in Canada, but are not necessarily accompanied by clear targets and plans to improve those indicators.

Many social indicators are released at various levels in Canada, but are not necessarily accompanied by clear targets and plans to improve those indicators.

- Can the economic gender equality indicators be used as an accountability measure for gender-based analysis performed by governments, or are there variables other than government programming that might affect the rise or fall in the indicators?

The economic gender equality indicators are different in character from one another, ranging from broad policy areas such as the performance of unpaid work, to narrower areas such as training hours. These may encompass in the latter case a combination of government programs, policies and independent private sector initiatives. Government can encourage the private sector to provide more training, provide resources and incentives, or even require the private sector to provide some training. In the case of unpaid work there are factors that are clearly out of government's control. Government can raise awareness about male responsibility for unpaid work and can facilitate through policies (such as encouraging men to take parental leave, portraying men and women in non-stereotyped roles in school curricula), but ultimately cannot force men to perform more unpaid work. Ideology, stereotypes and upbringing play a powerful role that government can chip away at, but that ultimately may prevail for generations to come.

However, these measures can be used as progress and accountability indicators on gender equality issues for governments and society as a whole, and as a basis for thinking about what action can be taken to reduce gender inequality.

Factors that might affect the three work indices are boom and bust cycles in which jobs are more available or more scarce, the collapse of or upturn in industries in which men or women predominate, the trend toward in-home care of seniors, sick or disabled dependents, accessibility and affordability of child care, the cost of living which might push some women and men to take on several jobs to make ends meet, availability of after-school programs and recreational facilities for children, etc. Some of these areas touch on the policies and programming of different levels of government, and some of these factors are tied to the global economy and not under the direct control of any government. Should the Total Workload Index widen, this cannot be confidently ascribed to the policies or programs (or lack thereof) of any one government, although one can reasonably speculate on why there has been a change in the index. One cannot say, for example, that “the Total Workload Index has widened, therefore this means the federal government has failed to implement gender-based analysis.” However, these measures can be used as progress and accountability indicators on gender equality issues for governments and society as a whole, and as a basis for thinking about what action can be taken to reduce gender inequality.

- The success of what types of policies could best lend themselves to measurement through gender equality indicators?

We would have to ask ourselves what specific federal and/or provincial/territorial policies might reduce the gender gap in the areas covered by the indicators. The following is not a comprehensive list, but constitute a few examples:

- The Total Income Index may be affected by family benefits policies, child support enforcement measures and pension benefits and policies.
- The Total After-Tax Income Index may be affected by tax measures.
- The Total Earnings Index may be effected by pay equity, affirmative action and other workplace equality measures.
- The Total Workload Index, Paid and Unpaid Work Indexes may be affected by home care programs, early retirement plans, child care services, cuts in health and social services and eventually by gender equality sensitization in schools. Bakker (1994) would argue that economic restructuring and monetary policy affect the gendered division of work.
- The University Degrees Granted Indexes which tracks degrees granted to women and men in fields of study that are female-dominated, gender-neutral or male-dominated may be affected by

scholarship programs for women or men to enter fields of study dominated by the other sex, and initiatives in elementary and secondary schools against occupational stereotyping.

- The Training Participation and Training Time Indexes may be affected by targets of government training programs or incentives to business to provide training to an equal proportion of women and men.
- The Occupational Return on Education Index may be affected by mentorship and recruitment programs in high status occupations.

Many other initiatives and factors may have an indirect impact on various indices, such as portrayal of women and men in the media.

- Is a perfect “1.0” desirable as a target?

The structure of the index, “1.0” being a measure of complete equality between men and women, implies a value judgement that 1.0 is the goal. Certainly, economic inequality has personal consequences for women and children, and implications for tax spending.

But should 1.0 be the goal for all the indices? For example, is it the goal for each of the two training indices that women and men receive an equal number of training hours? What if women need more training? If the index is above 1.0, is this a problem? What if men need more training? Do male-dominated occupations, such as forklift operator, engineer or systems analyst require more training? Educational studies have shown differences in boys' and girls' abilities to learn. Men may or may not be “slower learners” than women. Or more training might be needed for women than for men to move them into higher status occupations. The goal is not necessarily men and women getting the same number of hours of training, it is men and women getting the training they need.

The problem in assuming that 1.0 is the goal is the underlying assumption that women should be exactly like men. It leaves no option for creative solutions and ways of looking at the issue. For example, the goal for some homemakers' organizations may be for the Total Income Index to register 1.0, showing perfect economic equality between women and men, but the Paid and Unpaid Work Indexes remaining the same, showing men do more paid work and women more unpaid work. They could advocate that the difference in income be made up through policy initiatives such as income and asset-splitting and other measures to redistribute income.

The problem in assuming that 1.0 is the goal is the underlying assumption that women should be exactly like men. It leaves no option for creative solutions and ways of looking at the issue.

A related consideration is whether women want to perform less unpaid work and if men want to do more. The answer may be yes. Or do women

want to be paid or otherwise valued for this unpaid work or receive pension, tax or matrimonial property benefits for it? These are questions the indicators cannot answer, questions that have an impact on policy options and the acceptance of those options by Canadians. The answer may involve a combination of the above, with some women wanting to achieve financial security and independence through routes not necessarily identical to men's, which would require some creative policy solutions, and others who would be more than happy to turn in their vacuum cleaners for bigger paycheques and real workplace opportunities.

- Can the indicators be used for provincial/territorial comparison, or are there other factors that need to be taken into consideration?

Economic factors may affect one or several provinces and territories, but not others. However, something like training could be affected by government programming, and could alert other provinces or territories to a success story that might otherwise go unnoticed. To be confident that the training figures are being affected by certain programs or initiatives, outcome indicators for these specific programs or initiatives would be necessary to confirm their success. As well, high inequality figures may alert some jurisdictions to problems.

Awareness

“The 1995 UNDP Human Development Report makes...statements about the need to bring gender-sensitive indicators to the attention of policy-makers as a first step towards changing policies biased against women. Here gender-sensitive indicators are not ends in themselves but a political tool to be used to challenge the status quo.”

“The 1995 UNDP *Human Development Report* makes...statements about the need to bring gender-sensitive indicators to the attention of policy-makers as a first step towards changing policies biased against women. Here gender-sensitive indicators are not ends in themselves but a political tool to be used to challenge the status quo.” (CIDA 1996)

- How can the indicators be used to sensitize policy-makers and the public on gender issues, and the need to perform gender-based analysis?

The income indices together tell a story of how women rely on transfer payments and tax measures to bring them a small step closer to economic equality (F-P/T Ministers 1997: 18). This can be an important tool for those interested in gender equality both in and outside of government for example to argue in favour of preserving and enhancing these transfers and progressive tax measures. It is a matter of publicizing the indicators and holding special briefing sessions for policy-makers and NGOs to explain the indicators and how they can be used.

The indicators have already received some attention, for example in a recent *Globe and Mail* article which reported that if all working-age

women and men are included, women earn \$.52 to every dollar made by a man, rather than the traditional \$.73 figure which compares women and men in full-year, full-time work (Matas 1998). The article highlighted the controversy about measuring unpaid work and the realities of women, and paraphrased one official as saying that women could achieve economic equality in one generation if they stopped having children and replicated the work patterns of men, but the equality would last only one generation, and then there would be no people. The indicators have the potential to continue to provoke thought and debate about gender inequality in work patterns.

However, Janine Brodie argues that it is a mistake to think that simply pointing out the gendered nature of economy and economic policy concepts will in itself lead to gender-sensitive policy (Bakker 1994). Ideally, the indicators should be associated with the need for gender-based analysis of public policy and with strategies for action.

- Is it as important to reach out to the public as it is to reach out to policy-makers?

“The only social indicator that appears to be at all familiar to the general public is the unemployment rate...” (Vogel 1997). Vogel argues that in a representative democracy, it is important for the public to have access to the information provided by indicators. Miringoff et al. (1996) confirm this view:

If exports are strong, dividends high, interest rates low, inflation stable, and the GDP and stock market rising, we generally assume this country is on the right track.... Social data...are rarely presented and assessed as a unified body of statistics serving notice of significant improvement or decline. Such information is particularly needed during a[n]...election year when voters require a rational basis to judge where we are as a nation and in which direction we should be moving.

We know that 72% of Canadians believe gender equality is very important, and only 5% believe it is not important (Sullivan and Chalmers 1995). Public support may be necessary to motivate some decision-makers and to move the issue of gender equality and gender-based analysis of public policy higher up on the list of priorities.

- Is there a possibility of resistance to using gender equality indicators as a measure of equality for gender-based analysis?

Public support may be necessary to motivate some decision-makers and to move the issue of gender equality and gender-based analysis of public policy higher up on the list of priorities.

General areas of possible resistance include:

- *No buy-in* – What happens if the Canadian public or policy-makers do not agree with the measure of 1.0 as an indicator of success and gender equality, or criticize the indicators? In writing about indicators of social progress, Ross (1996a) commented:

Too often the only response one gets to such social statistics is to be told that they are not reliable measures anyway. Criticisms are trotted out: The data are poor, the stats gatherers are biased, the concepts are inadequate.... Certainly no one in authority starts shifting policy levers when these statistics are reported.

The challenge is to convince the public and top policy-makers that gender equality indicators are as important as interest rates in measuring the health of the nation.

The challenge is to convince the public and top policy-makers that gender equality indicators are as important as interest rates in measuring the health of the nation.

- *Not able to understand the indicators or how to use them:* If policy-makers and NGOs alike find the indicators confusing, they may not use them. An investment may be needed in explaining and popularizing the indicators.
- *Relevance of the indicators to the work of public policy analysts and to the lives of Canadians:* Most of the indicators provide a “big picture”, which individual public policy analysts working on some aspect of legislation, programs or policy may not see as relevant to their work. The movement to develop community-based social indicators in the US, with full public participation in choosing and prioritizing indicators, may lead to a sustained interest in the indicators and their progress by the public.
- *Lack of agreement on the path toward equality:* Even if one agrees with 1.0 as a measure of equality, understands the indicators and believes them to be relevant, differences in opinion may still arise about how to proceed. Acknowledging a problem may not always point to one type of solution. For example, the government response to the Oregon benchmark for poverty was the establishment of a workfare program (Oregon Progress Board 1994), which is a different response to a high poverty figure than what most anti-poverty organizations would advocate. There is also a danger that current programs to promote equality will simply be listed as a response to criticisms about the gender gap, rather than a re-examination of policy.
- How should gender equality indicators be “packaged” in order to better promote their use?

One can begin by looking at successfully reported indicators, such as the UN's Human Development Index, the unemployment rate, inflation, and so on. Complex data go into calculating some of these indices and statistics, but they are usually reported in a single-figure, simple way that immediately means something to people. Similarly, the economic gender equality indicators could be presented with some fanfare as “closing (or widening) the gender gap”. As the indicators attract attention and growing credibility, more policy analysts and decision-makers will be aware of them and may go beyond the cursory reports to examine them in detail.

Conclusion

...indicators do not change policy...and change is the goal. “An indicator is nothing more than a signal. After you get the signal you have to dig deeper to see what it really means,”Only with an action plan, and action, is the indicator likely to move. (Andrews 1996, quoting Marian Chambers, former Executive Director of the Jacksonville Community Council, Jacksonville, Florida.)

- Developing an action plan to use gender equality indicators for gender-based analysis.

There are two types of action plans to discuss. One is a macro-plan, that is, how the Government of Canada and other participating governments can use the indicators to further gender-based analysis. Another is developing a micro-plan – how you as an individual can better use the indicators in the performance and promotion of gender-based analysis. These are a few ideas to consider, reject, adopt as goals to strive for, or simply to stimulate thinking:

- *Access:* Inform social groups and all policy analysts where they can access these indicators. Provide briefings for NGOs on the meaning and uses of the indicators. Provide some explanatory resources, such as a phone number or e-mail address for answers to questions.
- *Practice:* Ensure the economic gender equality indicators form a part of gender-based analysis training within government departments. Ask policy analysts to report how they have used these indicators in developing policy. Use the indicators in annual reports of gender-based analysis implementation within departments.
- *Publicity:* Release the indicators every year, three years or five years with great fanfare and publicity, perhaps on International Women's Day or International Human Rights Day. Run a media campaign.

- *Refinement*: Were the indicators to be refined at some point, ensure widespread public consultations encouraging all Canadians to think about these issues and put forward their priorities. One question that can be asked is, “Women and men will be equal when...” If goals and objectives for the indicators are based on these priorities, they can become a powerful tool not only to inform gender-based analysis, but to measure government and community progress toward gender equality goals that Canadians themselves have defined. Another avenue to pursue in refining the indicators is to ask public policy developers who currently do not use them what indicators would be meaningful to them in their work.

As many questions have been raised in this paper, the author saw fit to conclude with the most important one:

- How will **you** better use the economic gender equality indicators in gender-based analysis, and what elements do **you** think should go into a macro-level action plan for using these indicators?

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Social and Economic Indicators: Underlying Assumptions, Purposes, and Values

Background paper

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Introduction¹

Over the past two decades, gender scholars have worked to highlight and understand the realities of women in social, economic and cultural life. Across a variety of disciplines, researchers continue to forge new theories, methodologies, and practices to advance women's equality and to provide insight into the complex processes at work in any society.

Governments have been involved in these efforts as well. The publication of *Economic Gender Equality Indicators* is a recent Canadian contribution to the public dialogue and policy development on gender equality. The goal of this new set of economic indicators is to “help raise public awareness of women's and men's realities, stimulate public policy discussion, encourage a search for explanations and responses, and monitor progress.” (Federal-Provincial/Territorial Ministers Responsible for the Status of Women 1997: 5.) The Symposium on Gender Equality Indicators was held to advance the discussion on gender indicator development raised in *Economic Gender Equality Indicators*.

This paper was developed for the symposium to explore the paradigms implicit in social and economic indicators in order to provide a broader context for discussing gender equality indicators. Our goal is to step back and question the assumptions and values that underlie the current social and economic indicator movement – including efforts to create gender equality indicators. In the first section we look at the emergence of indicators and the critiques that have been directed at them, both in general and in terms of gender issues. Next, we turn to several examples, starting with the long-lived economic measures from the National Accounts and Labour Force Survey. We then look at a recent effort, The Index of Social Health, which broadens the scope of measurement. We conclude the section with a look at several gender-specific indicators. The last section considers future directions for research and suggestions for improving the gender-sensitivity of indicator work.

The Development of Social and Economic Indicators

Linking Knowledge and Public Policy

Indicators reflect or represent complex concepts or conditions. They are statistics or other forms of evidence which attempt to make sense of uncertainty or the unknown by extracting simple ideas out of complex

¹ This report benefited from comments from Monica Townson, Jane Friesen, and other participants. Remaining errors and inconsistencies are those of the authors, particularly the old guy in the suit.

Our goal is to question the assumptions and values that underlie the current social and economic indicator movement.

ones (Innes 1990: 291). Through their use, we attempt to better understand social and economic phenomena. Indeed, they have become a part of our daily lives. It would be almost impossible today to describe the state of our economy, for instance, without referring to the inflation rate (CPI), the Toronto Stock Exchange 300 Index, or the national unemployment rate.

As such, indicators have proven to be a potent tool in program and policy-making as decision-makers seek out evidence to define problems and potential solutions as well as to create common ground for discussion. Today, policy-makers and the public widely subscribe to the view that policy-making should be well informed, that is based on facts and analyses, rather than personal experience, anecdotes or purely political considerations. Indicators play an important role in this process.

Indicators play an important role in program and policy making.

Efforts to link knowledge to public policy vis-à-vis the use of indicators are certainly not new. The economic measures of the business cycle in the 1920s were important milestones, not only for the economics profession, but for public and private decision-makers. But the shock of a Depression, followed by the need for mobilization for a war showed how inadequate early measuring systems were.

In the United States, the creation of the National Income Division within the Department of Commerce in the late 1930s marked a significant juncture because it signaled government's commitment to the preparation and dissemination of estimates of national income and product (Block 1986: 771). The work in Canada on the National Accounts began before the end of the war, with publication in the 1945 White Paper on Employment and Income. The driving concern was the post-war reconstruction challenge of maintaining full employment and growing incomes (Statistics Canada 1975: 22).

Since that time, governments have continued to play a central role in the production of economic indicators that not only highlight economic trends, but define the way we understand economic progress.

Interest in social indicators by contrast sprung from demands to assess the well-being of citizens in areas such as health, education, and housing. While work on social indicators dates back to the nineteenth century, the social indicator movement really gained impetus in the 1960s and early 1970s when questions were increasingly being raised about the character of "progress" (Noll 1996). Initially, challenges to the idea that "economic growth equals social development" during the 1950s fueled interest in social indicators, and, in turn, lent support to the introduction of welfare state programs in Canada and elsewhere. At the same time, there was new

faith in more rational models of governing in government circles and the policy sciences. In the early 1970s, the Economic Council of Canada, for example, undertook to explore social indicators in order to broaden the discussion of goals, and proposed a set of indicators for health, housing, and the environment, as well as encouraging the development of the underlying databases (ECC 1974: 62-66). Against this backdrop, the development of social indicators was seen as key to crafting a more activist social policy. The measurement of such change was seen as an important part of government's role in society.

Social indicators seen as key to crafting a more activist social policy.

As the development of welfare states in the 1960s marshaled interest in social indicators, perhaps not surprisingly, there has been a resurgence of interest in social indicators in the 1990s as governments dismantle welfare programs. The sources of interest, however, are much different. We identify three here.

First, decision-makers are currently embracing "evidence-based" decision-making in an effort to redefine the role of the modern state. There is a new focus on "outcome" measures within government to understand how well existing policies and programs are meeting their stated objectives, and to determine what activities government should be pursuing in the future. In many cases, decision-makers do not have the information necessary to assess the success or failure of programs – particularly programs which attempt to achieve social goals such as greater equality – and are consequently sponsoring research into indicator development.

Interest in indicators is linked to the changing relationship between citizen and state.

The second source of interest in indicators is linked to the changing relationship between citizen and state. At a time when the public is increasingly skeptical about governments (Ekos, Rethinking Government Project), many citizen groups are demanding greater accountability from their public officials. These demands take many forms ranging from public accounting (i.e. value for money) to greater popular participation in setting the goals and limits of state activity (i.e. referenda laws). The celebrated Oregon Benchmarks project is a good example of renewed interest in social indicators within government and by the general public. This project was created with extensive public input to set out long-term social and economic goals for Oregon and to chart progress toward these goals (Oregon Progress Board 1996).

Last, but not least, the voluntary sector and various advocacy movements in Canada have also embraced social indicators as a means of monitoring social progress as governments at the federal and provincial level restructure welfare state programs (Shookner 1997). The concern has been to focus attention on the importance of social life in Canada and the

critical role governments have played in ensuring the well-being of all Canadians – in the form of universal health care, support for families, income replacement during economic recessions, and so forth. Progressive social groups point out that governments have conquered their deficits at the expense of low- and middle-income Canadians. They are using social indicators to make their case that investing in programs like the Child Tax Benefit or child care makes good economic and social sense both in the short term (lower rates/depth of child poverty) and in the long term (improved well-being and productivity of all citizens).

Social indicators have been embraced as a means of monitoring social progress and in ensuring the well-being of all Canadians.

These examples of social and economic indicators illustrate how indicators have been developed and used to support and critique public policy – not only by governments but by interest and advocacy groups as well. After almost a century of use, indicators remain powerful tools to describe the world around us.

Critiquing Indicators: General Assumptions

The development of social and economic indicators – even the most recent examples which are detailed later in this paper – is based on a “positivist” conception of knowledge and knowledge use in policy, one that holds up knowledge based on facts as elaborated and verified by the methods of empirical sciences. This particular understanding of knowledge and its links to the policy process are summarized by Judith Innes.

This view assumes that policy-makers should use formal information, such as statistics or the findings of social science, to aid their decisions.... For this view of knowledge to apply, policy-makers must represent unitary interests and be able to make meaningful, deliberate choices. Their task is to choose options that are likely to achieve goals on the basis of criteria, evidence and logic.

What counts as knowledge use in the scientific model is explicit information processing, supportive of identifiable decisions. What counts as knowledge includes facts, statistics, theories, and findings for formal research and analysis. Experts who are unbiased and outside of a political process produce such knowledge ... The process of informing policy is therefore stepwise, with a division of labor where policy makers do the goal setting, experts do the analysis, and policy makers make decisions (Innes 1990: 3).

The value of indicators resides in the notion that they are grounded in empirical reality.

This predominant model of social and economic indicators rests on a few fundamental assumptions about what constitutes knowledge and its production. Inherent in the indicator project is the idea that one can *reduce* complex social and economic phenomena (empirical reality) to a single meaningful statement or stylized fact, that there is a *direct* correspondence between an indicator (i.e. unemployment rate) and an experience, event or condition. Indeed, the value of indicators – for policy making in this instance – resides precisely in the fact that they are ostensibly grounded in empirical reality, and *not* in knowledge derived from theory, intuition, or deduction. Indicators and other empirical tools are held up as *value-free* science.

The neutrality or objectivity of social and economic indicators is open to challenge on a number of fronts, three of which we discuss below.

Whose Reality Do Indicators Capture?

An indicator is a set of rules for gathering and organizing data so they can be assigned meaning. They are not neutral.

As most would agree, an indicator is “a set of rules for gathering and organizing data so they can be assigned meaning” (Innes 1990: 5). Thus, every indicator starts with some view of how the world works or should work. This is reflected in the data used, the weighting, the time frame analyzed, and choices about method and disaggregation (regional, gender, age, etc.). An indicator highlights certain aspects of a situation at the expense of others, allowing observers to “see” the world through a particular lens, channeling thoughts and actions in particular directions.

In short, *indicators are not neutral statistical constructs*. They validate particular world views and prioritize selected areas of knowledge. The patina of objectivity is compounded if and when indicators are institutionalized. Usage over time tends to reify a particular understanding and measurement of an issue such as unemployment or productivity, making it into an objective reality rather than a social construction that privileges established interests and world views – in government, in business, or in academe.

For example, governments as well as scholars have historically expended a great deal of energy developing and monitoring economic indicators such as the GDP, debt ratios, productivity and the like. As a result of this activity, economic indicators have entered common parlance. They now shape the way we think about the economy. By comparison, relatively little attention has been paid to social indicators such as measures of inequality or the vitality of social networks in communities. These facets of social and economic life are arguably as important as the health of the

market economy, yet, because we don't systematically measure them, they are less visible, and, consequently, rendered less important – at least in the public eye.

Another common example of this type of bias in practice is the unemployment rate. Over the years, methods for defining and calculating the rate have changed as the popular and political understanding of unemployment has shifted. For example, certain classes of workers (i.e. female farm workers) were excluded in the past when calculating the unemployment rate. In this instance, women working on family farms were not considered “productive” workers because their work was understood as an extension of their domestic labour. Their reality was clearly not captured in the unemployment rate. More recently, this was changed.

Indeed, the notion of labour force participation is restricted to paid workers and self-employed and those actively seeking paid work. But people maintaining families, learning, taking care of family members who are ill or incapacitated are considered as “not in the labour force”. Statistics Canada is quite clear about the definitions. But the perception that work and employment are the same leads too often to the assumption that those not in the labour force are “at leisure” or not engaged in society. In most cases, this is far from the truth.

Work and employment are not the same.

What Types of Knowledge Do Indicators Reveal? How are Indicators Constructed?

Just as indicators are informed by underlying assumptions and values – assumptions and values which belie their purported objectivity – they are also constrained by available methodologies and methods. As noted above, indicators attempt to reduce complex phenomena to simpler ideas or concepts, but the scope and breadth of indicators are always limited at any point in time by what is in fact measurable.

It is not surprising that indicator development is well established in the study of markets where market activity is measured in dollars. The Gross Domestic Product, for example, which estimates national income and product, is used habitually as an indicator of a country's economic activity. Recent critiques by Waring (1988) and others (Anderson 1991, Folbre 1994) have revealed the gender-biased assumptions about what constitutes economic activity that underlie the GDP. Feminist scholars have made progress in challenging national statistical agencies to account for women's work, much of which is unpaid, in the National Accounts. (See the section on feminist critiques of indicators below.)

Indicator development is well established in the study of markets where activity is measured in dollars.

How do you measure the value of childcare, which is integral to the economic health of a society?

Much of the battle, however, lies in the statistical conventions that govern the construction of the GDP, i.e. the definitions used in data collection, questionnaire design, and implementation issues. One of the reasons that economists have historically defined economic activity exclusively as paid market inputs and outputs is because these commodities share a common unit of value: money. How do you measure the value of child care which is integral to the economic health of a society? Current efforts are focused on estimating the cost of performing unpaid work in the market (replacement value) (Statistics Canada 1995a). The standard is still the market; existing accounting practices continue to constrain discussions about how to measure and value unpaid work.

The debate about the definition of the GDP is a well-known example of a fundamental problem inherent in the development of social and economic indicators. *Indicators measure what is readily measurable.* We know, for example, that crime rates have been going down the past few years in Canada. However, crime rates are based on crimes reported to police departments (which may or may not be systematically recorded). These rates do not capture criminal activity that goes unreported such as domestic violence (Canadian Centre for Justice Statistics 1997). Crime rates are, therefore, imperfect measures of criminal activity.

Existing Measures Tend to Focus on Individual, Household or Firm Attributes or Outcomes. Is There More to be Measured?

Social and economic indicators generally focus on individuals, households and firms as the unit of analysis. This orientation implicitly and explicitly holds up the individual as the origin of human activity, the driver of social and economic change.

There is of course great debate across many fields of study around the place of the individual in social and economic activity. In labour economics, for instance, “human capital models” maintain that individual progress in the labour market reflects the education, skills, and health of the person. The market instantly processes this information and ensures the appropriate match between person and job, and proper remuneration for the position. Alternately, “structuralist” explanations focus on institutional barriers such as occupational segregation within the labour market as the reason behind employment location and wage patterns.

Data readily exist to support research into the attributes of individual employees. Many of the large statistical surveys currently available, such as the Labour Force Survey, chart the attributes and outcomes of individual Canadians. It is more difficult to marshal evidence in support

of structuralist hypotheses, those that examine systemic discrimination, for instance, within the context of internal labour markets. Economists in these cases are often forced to turn away from mainstream liberal theoretical explanations and research methods (use of large secondary data sources suited to complex econometric analysis) to more qualitative techniques such as case studies or historical analysis – approaches which are not widely validated in the hard science of economics (MacDonald 1994).

The information used to identify systemic discrimination is difficult to obtain.

The individualistic bias evident in existing indicators and sources of quantitative data does have a profound impact on the kinds of analyses that are possible. Recording differences and similarities between men and women as groups, for example, as many of our indicators now do, takes us only so far. Information about the structure of relationships or networks, whether at the family level, the firm level, or the industry, country, or global level is increasingly emerging as a necessary dimension to capture if we are to understand market power, gender relationships or the transmission of new ideas.

Scholars are pushing the envelope, adapting existing indicators and methods to explore precisely these types of questions. It may be that our existing stock of social and economic indicators is not up to the task – in which case we are left with the job of devising new indicators which capture not only individual attributes but structural relationships which shape social and economic life.

Conclusion

These are not arguments against the use of indicators, especially in the process of informing public policy. We cannot get away from institutionalizing some concepts and information as a basis of communication and understanding. But this discussion highlights some of the problematic assumptions inherent in the development of social and economic indicators which obscure the ways in which indicators are constructed and how they in turn construct the world we see.

There are problematic assumptions underlying social and economic indicators which obscure their construction.

Critiquing Indicators: Gendered Assumptions

The express intent of indicators is to represent or reflect specific empirical phenomena, to render these phenomena “knowable”. Methodologies and research techniques are developed to capture the “reality” of selected events, conditions or concepts. This immediately raises the questions: “Whose reality is captured?” and “Is reality measurable?”

A variety of groups have challenged the objectivity of scientific pursuit.

As argued above, social and economic indicators historically have embodied a positivist conception of knowledge, one grounded in the empiricist tradition of western science. More recently, a variety of groups have challenged the purported objectivity and privileged status of scientific pursuit, notably feminist scholars who have played a key role in challenging scientific positivism and its expressions across disciplines.

Feminist critiques of the humanities and the sciences are varied and diverse, stemming from a number of different theoretical and methodological traditions. Yet, there is agreement on the premise that **gender** is a key organizing principle of social and economic life, distinct from an understanding based exclusively on biological differences between the **sexes**. Here, gender is understood as “the culturally specific set of characteristics that identifies the social behavior of women and men and the relationship between them”. By contrast, sex “identifies the biological differences between women and men” (Status of Women Canada 1996: 3).

Feminist scholarship is a different lens through which to understand social and economic life.

In each area, “... feminist scholars have come to understand that what we take to be humanly inclusive problematics, concepts, theories, objective methodologies, and transcendental truths are in fact far less than that. Instead, these products of thought bear the marks of their collective and individual creators” (Harding 1986: 15). As well, they reflect the intellectual and political climates of their times. This is not to say that past theoretical and empirical knowledges are wrong, but rather that they provide a singular, or incomplete, perspective of social and economic life. Feminist scholarship provides a different lens through which to understand social and economic life, a lens which attempts to better capture the diversity of human experience – specifically its gendered dimensions – through new conceptual frameworks and methodological tools.

Much of this work involves excavating the underlying assumptions of dominant theoretical paradigms (what questions are being asked and what information is deemed relevant), methodologies (how one goes about doing research) and methods (techniques for gathering evidence). Below, we pursue our analysis of underlying assumptions of indicators by looking at the ways in which “gender bias” informs economic and social indicators. By gender bias, we mean a bias that operates in favor of men as **a gender** in everyday attitudes and actions, in theoretical reasoning, or in public policy (Elson 1991: Chapter 1). This is not to say that all men are biased against women. Rather, bias is present when asymmetries (i.e. differential wage rates for the same job) are ill-founded or unjustified. In most instances, gender bias stems from the particular ways in which earning a money income or paid work (production) is integrated with having and raising children (reproduction).

Do Women Experience the World as Men Do?

Feminist scholars have argued for many years that women experience the world in very different ways than men do, and, consequently, that it is necessary to employ gender-sensitive research theory and methodologies to explore the condition and place of women and men in society. This contention strikes at the heart of traditional research which holds that the study of men, just like the usage of “he” as an impersonal pronoun, reveals the experience of both women and men. Although sometimes labeled as “gender neutral”, it might more appropriately be called “gender-invisible”.

Feminist analysis challenges the assumption that everyone is affected by or responds to social and economic life in the same way, and focuses on the diverse social realities, life expectations, and economic circumstances within and between women and men.

Perhaps the classic example of this type of bias in practice is the search for treatments for heart attacks and strokes. Early work in understanding and treating these diseases was based almost exclusively on studies of men and their physiology. Researchers argued at the time that the results of these studies would be equally applicable to both men and women. Using women in these studies would in fact confound the process of identifying the characteristics of the disease, and thus methods for its treatment.

Carol Gilligan makes a similar point in her famous book on moral development *In a Different Voice* (Gilligan 1982). She challenged the traditional philosophical and psychological literature – in particular the work of Lawrence Kohlberg – as advancing **male** notions of justice as the norm for **human** moral development. Kohlberg maintained that individuals pass through six stages of moral development, culminating at the point where they govern their own behavior based on universal principles of justice, reciprocity, and respect for others as individuals. The problem for Gilligan was that girls and women never scored beyond stage three of Kohlberg’s scale. This wasn’t because women were morally deficient, she argued, but because Kohlberg’s conception of morality was simply too narrow to accommodate anything other than the male point of view.

There are examples of this type of gender bias in labour market studies as well. Both existing theory and data are problematic in attempting to capture women’s experiences as paid workers. The area of part-time work is a good example. In surveys, when asked why they are working part-time (less than 30 hours per week in Canada), workers are presented with a list

Work in the area of moral development has been deemed gender-biased as male notions of justice have been advanced as the norm.

Examples of gender bias in labour market studies have also been shown.

of mutually exclusive options which include: “could only find part-time work”; “going to school”; “did not want to work full-time”; “personal or family responsibilities”. Consequently women, who may very well wish to work full-time yet have demanding family responsibilities, are forced into one slot or the other. In this instance, the survey design is based on typical male patterns of work, and, consequently, does not capture the reality of women’s lives and the restrictions they face in making decisions around paid work.

When Women are “Visible”, How are They Defined?

Gender invisibility is one form of gender bias that is evident in the definition and construction of indicators. In such cases, the roles are not measured or are undervalued. In large part, it stems from how women and their activities have been historically understood and valued.

The sexual division of labour through the early and middle parts of the twentieth century not only shaped family life, but also accounted for our understanding of social and economic institutions.

In Canada as elsewhere, women have been defined largely in relation to their responsibilities as mothers and caregivers in the private home, separate from the male/public realm of employment. The strict sexual division of labour, characteristic of many Canadian families through the early and middle parts of the twentieth century, not only shaped family life, but informed our understanding of individual gender roles and attitudes, our understanding of the ways in which the world works, and our social and economic institutions. This dichotomy between the public world of paid employment and the private realm of the household in effect worked to marginalize women and privilege men’s activity.

The use of the household as a unit of analysis creates a puzzle that must be solved.

This particular gender bias is notably reproduced in income and poverty studies that are based on data sources (i.e. Survey of Consumer Finances) that are organized around the household as the unit of analysis. Individuals within the family are identified by their relationship to the head, defined in most instances as the male breadwinner. Unless women are identified as head of household – that is as unattached or with no spouse present – it is difficult to conduct conclusively a gender-sensitive analysis. These surveys assume that all members of a household pool income, and, in turn, have equal access to family economic resources. This assumption is problematic to say the least as it systematically hides the distribution of income within families. Thus, while we can readily determine the average income of a female-headed lone-parent household, it is much more difficult to draw definitive conclusions about the average income of women in couple households. As a result, it is hard to determine with accuracy the average income of women as individuals or as a group. Women and the value of their work in the household is systematically obscured in these surveys.

In a family, various members may earn income and make cash contributions into the “pot” of the household. Some members may decide on the allocation of that pot, including the reservation of some part of their initial contribution. Some members may do the actual purchasing of goods and services used by the household, and yet others may consume these same goods and services. Determining “household behaviour” requires delving into these intra-family transactions and decisions.

How Has the Notion of Gender Been Used in the Construction of Indicators?

Indicators have been used extensively in newer studies that focus specifically on the status of women. These efforts attempt to make women visible as social and economic actors. For the most part, empirical studies look at the extent to which women have achieved education, economic resources, or physical and mental health, that is individual attainment. A good example of this type of work is the Statistics Canada publication, *Women in Canada: A Statistical Report* (1995b).

Newer studies have made efforts to make women visible as social and economic actors.

A second type of indicators are the traditional disaggregation of information by sex, along with other categories such as province, age, educational attainment, etc. This practice is followed extensively in most modern surveys, allowing for the identification of differences by sex. By using such information for either weighting purposes or as the actual data, it is possible to develop gender-sensitive indicators.

Another body of work, again drawing on indicators, attempts to measure the status of women relative to men. The concern here is whether women have as much education as men, earn as much, or live as long. In this work, measuring the relative status of men and women serves as an empirical method of determining the degree to which there is equality between the sexes, i.e. gender equality. The wage gap between men and women is a well-known indicator of gender equality; studies which document women’s over-representation in occupations like teaching and nursing compared to men fall into this category as well (Sugarman and Straus 1988: 230-233).

Taken together, this body of empirical research has advanced our understanding of the position of women and men in our society. More recent research into measures of gender equality is taking us beyond measuring the individual attributes of women or men, to understanding how gender relations are embedded in our social and economic institutions like the family or the labour market.

The measures of gender equality take us beyond measuring the individual attributes of women and men.

Yet, this work is informed by certain assumptions as well, notably, that gender equality means that women will be equal with men when their status or position in society is the same (i.e. when they earn as much as men do and are represented in equal numbers within each occupational group). In this construction of equality, men are held up as the “standard” against which to measure progress. There is little scope in existing measures to accommodate or value women’s different patterns of life. To take this example to its extremes, one could argue that women will be equal with men when they have similarly high incarceration rates.

Conclusion

The thorny issue of measuring the status of women in society in all of its dimensions is compounded by the many assumptions that underlie existing social and economic indicators. The assumptions, purposes and values that we have discussed lead to some basic questions about indicator development. Is it relevant to pursue indicator development at all given the problems inherent in selecting specific indicators, establishing what they mean, and what knowledges can be measured? Is it possible to work with existing indicators to look at questions such as women’s equality, based on the gendered and individualistic assumptions built into many of these same indicators? Is it enough to add sex as a variable to be analyzed?

Clearly, efforts continue to push ahead in developing gender-sensitive indicators. We believe that this work, albeit fraught with problems, is useful in describing the position of women in Canada, in its diversity, and in advancing efforts to achieve greater gender equality. Yet this discussion of the underlying assumptions of social and economic indicators suggests caution in developing and using indicators. Indicators are not neutral windows on the world. We must return again and again to the assumptions behind old and new measures of social and economic life.

Indicators in Use

In this section, we examine some prominent social and economic indicators and their underlying assumptions, specifically as they relate to gender. We have chosen five well-known social and economic measures. The first set of indicators we review is the System of National Accounts (Gross Domestic Product (GDP) and real disposable income per capita or per household). Next, we turn to labour market data, specifically the headline indicators from the Labour Force Survey. Third, we look at a broad social indicator, the Index of Social Health. We then examine the Human Development Index (HDI) and its variant, the Gender-Related Development Index or GDI, as well as the Gender Empowerment Measure

Here, five prominent social and economic indicators are examined.

(GEM), both produced by the United Nations. Lastly, we review the Economic Gender Equality Indicators (GEI) produced for the Federal-Provincial/Territorial Ministers Responsible for the Status of Women.

Real Disposable Income Per Household, GDP (CSNA)

The System of National Accounts, including Gross Domestic Product (GDP), consumption, real disposable income, and productivity (output per person) underpin most macroeconomic analysis today. National accountants are quick to point out that they are not measuring social welfare, but rather the market-based activity in a society and the allocation of resources among major uses (Statistics Canada 1975: 28).

The litany of shortcomings of GDP are well-documented and widely discussed (Eisner 1994). For a start, the GDP and other measures derived from the National Accounts are gender invisible. Only market-based transactions are counted or imputed based on market analogs. Moreover, real disposable income per household is used as a proxy for economic welfare, while no information on intra-household division is possible.

The GDP and other measures derived from the National Accounts are gender invisible.

National accountants are working on a number of these issues, such as: the problems of unmeasured household production; the valuation of leisure time; estimating environmental damage; and resource depletion accounting. Yet much remains to be done, especially in taking gender into account.

Gender-sensitive National Accounts pose particular problems, with the difficulty of disentangling production by firms and consumption by families on a meaningful gender basis. There is some hope that an estimate of real disposable income could be developed by gender, although all of the problems that arise in income distribution work by gender would confound the analysis here. Indeed, it is important to remember that the National Accounts are essentially a synthesis of a large number of surveys of firms, governments, and people, as well as administrative records. Thus each of these building blocks would need to take gender into account before the Accounts could be made gender-sensitive.

Gender-sensitive National Accounts pose particular problems such as with the difficulty in disentangling production of firms.

Labour Force Indicators

This long-standing survey of labour market conditions provides detailed disaggregation by a number of variables, including sex, age, region, and industry. As a result, the Labour Force Survey (LFS) serves as a ready source of indicators of individual attainment of women as a group (e.g.,

female employment rate) and by sub-group (e.g., labour force participation rates by age and sex groupings), as well as gender equality indicators (e.g., ratio of female to male unemployment rates).

The development of the LFS occurred at a time when the attainment of full employment was a primary goal for governments, where increases in female participation rates were rapid, and new entrants from the post-war baby boom were increasing the growth of the source population. Not surprisingly, most of the effort involved in improving the LFS was directed to better understanding these phenomena.

The survey is based on several gendered assumptions about the nature of economic participation – that is employment in the paid labour force – and work patterns generally. Strict distinctions are made between those who are economically active (the employed and unemployed) and those “not in the labour force”. Male employment patterns are understood as the model against which to measure all labour force participants and their activity.

Index of Social Health (Canadian Variant of Fordham Index)

The Index of Social Health (ISH) is published each year by the Institute for Innovation in Social Policy at Fordham University in Tarrytown, New York. Marc Miringoff has developed this Index as a method for monitoring social well-being in the United States. It is comprised of socio-economic indicators covering 16 different social issues which cover all stages in life.

Each indicator used in the ISH is a relative measure over a time period.

Each indicator is measured in comparison to its own best and worst performance over a given time period. The best performance is scored at 10 and the worst is set to 0. All other observations are scored within this 0 to 10 point scale, based on the relative performance of that year. The scores derived for each indicator are averaged and expressed as a percentage to reach an overall score. If all individual scores for one year were the best scores over the time period, the Index would be 100. Declining performance on one or more measures results in a lower Index score. The Institute charts the yearly Index scores against GDP per capita in order to compare social and economic progress.

Satya Brink and Allen Zeesman have employed this methodology to chart social change in Canada between 1971 and 1994, adapting this American model to social life in Canada. According to the authors, Canada experienced its best years for the Index of Social Health in the latter half of the 1970s. The Index sharply declined between 1980 and 1983, after which it remained fairly stable until 1989, and then declined again for two years. The Index recovered briefly in 1992 and flattened out at the level

experienced in the 1970s (Brink and Zeesman: 8). The authors also calculated the Index for different age groups, drawing on age-specific indicators, and for each province.

The Fordham Index of Social Health is a conceptual model governed by demographic considerations. It employs a relative methodology for converting social variables into units on a common scale. The scale is linked to the reality of a country's performance over time. All items are weighted equally in the final Index score.

The Index for Social Health is a gender-invisible measure. It assumes that the determinants of social health are the same for men and women. While it is possible to disaggregate each indicator by gender, this raises the question about the individual components of the index. Is there a distinction to be made between men's social health and women's social health? Do the indicators used in the Index capture those things that are important to women's social health? Teen suicide is clearly a key measure of youth health. Because boys are much more likely than girls to successfully commit suicide, they make up a much higher proportion of reported suicides. Yet, we know that depression is very prevalent among teen girls. Is this the best indicator then to capture mental health for teen boys and girls?

The Index of Social Health is another gender-invisible measure.

The other major assumption underlying this model is that it is based on individual or family-type attributes. It does not capture relational dimensions of social health. And as a result of its methodology, which charts change based on the best and worst years in a given time period, we would only be able to compare the social health of women over time, and not between women and men.

HDI and GEM (UNDP)

The United Nations Development Program (UNDP) has published the human development index (HDI) each year since 1990. The HDI compares 175 countries on three basic measures: longevity, educational attainment; and standard of living.

In 1995, the *United Nations Human Development Report* introduced a modification of their HDI to reflect gender differences, creating a Gender-Related Development Index (GDI) (UNDP 1995: Chapter 3). This measures achievement in a similar manner to the HDI, but with disaggregation or adjustments for differences between men and women. One of the major innovations is a "penalty" for inequality, such that the GDI rises when the achievements of men and women increase, or when

Human Development Index has been modified to reflect gender difference by creating the Gender-Related Development Index.

the inequality between them is reduced. Equally important, this penalty is explicit and transparent in that others can raise or lower the penalty and recalculate the measures.

The underlying model is of the “human capital” type, with improvements in literacy, health, and Gross Domestic Product per capita reflecting “progress”.

The Gender Empowerment Measure (GEM) was also introduced, concentrating on economic, political and professional participation.

At the same time as the GDI was published, an additional indicator was introduced, the Gender Empowerment Measure (GEM). This index concentrates on participation – economic, political, and professional. The components are per capita income, the share of parliamentary seats, and the share of employment in the occupational classes of administrative/management and technical/professional. Penalties for low shares of women are applied to all components.

Anyone familiar with the functioning of parliament may question whether access equates with power. Similar observations would be appropriate regarding Boards of Directors of private companies and organizations. But the United Nations is constrained in developing measures for which the data can be obtained for most of the countries in the world.

The GEM is reflective of an underlying model of “structural” barriers, although the choice of occupation may contain a strong element of human capital as well.

Economic Gender Equality Indicators (F-P/T Ministers)

Economic Gender Equality Indicators represent the results of a study commissioned by the Federal-Provincial/Territorial Ministers Responsible for the Status of Women. These indicators attempt to provide a comprehensive picture of the economic standing of women in Canada. The project is designed to inform public dialogue and policy development, and to promote the goal of greater gender equality.

Indicators are divided into three groups: income, work, and learning. Under each heading, indicators were developed that included aspects of women’s economic realities that are often overlooked, valued both differences and similarities between women and men, and linked economic and social aspects of life. All indicators were derived for Canada and the provinces and territories and show averages for women and men over time. They are based on the individual attributes of men and women. Where possible, they attempted to reflect the situation of women with different age, education, occupation and employment characteristics, and those with young children.

The gender equality indicators are all expressed as indexes using the ratio of women to men, where 1.0 represents equality. Ratios either below or above 1.0 indicate inequality or imbalance for that indicator. For example, the total workload index examines the extent of gender equality in overall workload defined as hours spent doing both paid market work and unpaid work of economic value (i.e. child-oriented work, providing help to relatives, performing household work, volunteering). In 1992, the average workload for Canadian women was 8.9 hours per person per day, and 8.3 hours per person per day among men. The workload index is 1.08 (dividing the time for women by the time for men). In this case, the gender gap was 0.08 where women performed the larger share of total work.

The economic gender equality indicators are an innovative attempt to better understand gender equality in Canada. Working within the confines of existing data sets and definitions, they provide a broad set of indicators that measure the relative economic standing of women and men. The indicators are designed to specifically move away from the limitations inherent in focusing exclusively on the individual attributes to the relationship between individual men and women. They highlight the quantitative dimensions of economic status and do not attempt to measure other more qualitative or subjective dimensions. The vision of equality embedded here is clearly one predicated on the equal or “same” status of individuals.

The use of economic gender equality indicators as a measure of the relative economic standing of men and women is an innovative way to better understand gender equality in Canada.

Producing Good Indicators

As a byproduct of preparing this paper, we have synthesized a list of criteria for good economic and social indicators (including the incorporation of a gender dimension). This draws on the work of Anderson (1991: 49 ff.), Carvalho and White (1994: 13), and a recent CIDA study (Beck and Stelcner 1997).

How Should an Indicator be Put Together?

This first group of criteria are mainly technical matters, around the general theme of “quantification”. We note below the desire for more qualitative dimensions, but the tools need to be developed for their inclusion in social and economic indicators.

- A quantitative measurement – with properties that include unambiguity, consistency, and sensitivity.
- Specificity or focus – measures the problem to be fixed or the feature to be improved.

There are a number of criteria for developing good economic and social indicators.

- Clarity of definition – sufficiently well-defined that reproducible measurement is possible over time and across regions by different people.
- Technical soundness – data should be reliable, timely, and well-documented.
- An important measure in its own right or reflective of something that is important; for example, a measure of a major problem.
- Relevance – appropriate to the needs of the users.
- Disaggregation – all data should be disaggregated by sex. As well, disaggregation by age, ethnicity, and socio-economic grouping is desirable. Emphasis on various gender roles is also desirable (marital status, family makeup, occupations, etc.).
- Capable of also measuring different geographical areas, societal groups, etc. so that its distribution as well as the level or change is measurable.
- Participation – collected in a participatory fashion, with inputs from all stakeholders.
- Forward-looking – measuring past trends, and highlighting concerns that may not appear to be immediately important or even apparent.

These criteria are particularly appropriate for those with few resources.

- Already available or easily measured from existing information.
- The number of components chosen should be small.
- Be selective – focus on a relatively small number of priority indicators reflective of the major problems or significant dimensions in a society.

It is hoped that some organizations will continue to push the frontier by ignoring these criteria. Otherwise little genuine progress will be made on upgrading the quality of the indicators in use.

How to Communicate the Story of the Indicator

Having an indicator is just part of the effort. Its purpose is to influence others. Thus it must be communicated, through the media, in reports, and through normal conversation. To that end, the following criteria should be kept in mind.

- Comprehensibility – easy to understand.
- Short time lag between date of occurrence and availability (timeliness).
- International comparability is desirable.
- Adaptability – usable for different countries and circumstances.

Additional Considerations

Indicators that are based on **ordinal** versus **cardinal** ordering may be less sensitive to the underlying data on quantities and prices (spatial and inflation dimensions), methods used to adjust for size of families and economies of scale in households, the existence of rationing, and the breadth of the basket used (Hentschel and Lanjouw 1996: 3).

Measures may adjust household expenditure (or other aggregate concepts) for the number of people or their “needs” by applying “equivalency scales” to standardize the number. This approach implicitly assumes that less consumption by a member of a household reflects less relative need within that household. But it could reflect patterns of discrimination **within** the household, unrelated to actual “needs” (Hentschel and Lanjouw 1996: 32).

If disaggregation by sex is not enough, then what is required? Although gender is any grouping of data, it usually connotes a relationship or role between the parts. For example, gender roles may differ by family composition (single, divorced or separated, or married, with and without children, etc.). Gender measures may relate to multiple spheres or categories of activity or time use. Paid work, unpaid work, child care, and leisure time would be a more complete picture than measures that only look at paid work.

What if it is not possible to disaggregate by sex or by gender category? Measures may refer to aggregation across different units of observation, for example, individuals, families, firms, or communities. There may be an unknown mix of male and female respondents or members within the units responding to the survey.

Nevertheless, some adjustments can be made for gender differences. For example, the UNDP uses wage differentials and labour force participation rate differences to develop a relative labour income proxy, which, in turn, is used to adjust GDP per capita. Of particular interest is the use of a “penalty function”, which can weight differentially gender variations, depending on the importance to be attributed to gender equality (UNDP 1995, Chapter 3).

Directions for Improved Indicators

At the Symposium there was a fruitful discussion of the issues raised in this paper. We first summarize some of the main issues raised during the Workshops. We have also extended the set of recommendations from the first draft of the paper to include additional suggestions from the Workshops.

Workshop Issues

There are a number of implicit models underlying social and economic indicators. Some focus on individuals – their incomes, their human capital, and their health. But gender is about the “collective” or the roles of males and females. The framework or model needs to consider these relationships specifically. As well, the configuration of institutions and how they behave is important.

A “gender-equality” model focuses on both the levels and rates of change of the components. For example, rising income is a positive outcome if both sexes participate in it; more rapid growth of the lower income level is also desirable, implying a move towards convergence.

Measurement of market-based activity alone is not enough. Inclusion of the informal sector, the household sector, and a broader view of society is necessary to reflect the activities of both sexes.

The decision to be measured is not something to be taken lightly. In the aboriginal communities there is a serious debate of whether to be documented or not. This is particularly heightened when the measurement is for purposes that are not necessarily in their interest as a group or in support of decisions in which they do not participate. This too is a “gender” issue.

Indicators are not “neutral”. They are meant to be used to heighten awareness, to quantify in order to be part of the “game” of evidence-based decision-making. They can also measure a gap between the desired level

or state and current conditions. It is preferable if the view of the desired state can be developed in a fully participatory fashion. The proliferation of indicators should be seen as a sign of dissatisfaction with current measures.

A distinction should be made between “customers” and “citizens” in thinking about users of statistical data. There is a problem when the statistical agency treats people as revenue sources through “user pay”, while society is expecting them to represent their views in political debates. Should data be made available to citizens at no cost?

Should people be treated as revenue sources through user pay initiatives?

Current projects of indicator development tend to be dominated by the values of the market system, the transactions in marketable resources rather than on those that deal with relationships. They also tend to exclude concern with gender-related issues and with women’s realities. They focus heavily on quantitative data and tools, and involve little development of qualitative data. Also lacking are efforts at systematic validation of indicators.

Recommendations for Statistical Agencies

We have grouped the recommendations from the Theme II Workshops and synthesized others from the initial draft under five major headings, based on who is responsible for following up on the recommendations. Please look through the full set to gain some sense of the current inadequacies that we all wish to overcome to improve the quality of indicators and their capacities to include the gender dimension.

The central statistical agency has the largest number of recommendations directed to its attention. This reflects its strategic importance in providing the underlying databases for most analysis. As well, as one of the sponsoring organizations it is not unexpected to “hear from the participants”. But everyone should remember that statistical agencies respond to expressed needs. As users or producers of Indicators it is extremely important that we speak up frequently, loudly, and through as many channels as possible. Otherwise, changes will happen only slowly.

- Household surveys should be fully disaggregated by sex and by gender roles. (World Bank 1995: 63 ff., Elson 1993: 244 ff.)
- Greater priority should be given for gender-disaggregated analysis of existing data sets.
- Data on how people use health and education services should be collected routinely as part of national consumption and expenditure surveys.

There are several recommendations that can be directed to the central statistical agencies.

- Broaden the national income accounting framework to include the value of unpaid work and to reduce it by environmental depreciation.
- Collect more data from individuals on consumption and assets to obtain a better understanding of the allocation and control of resources within households.
- More information on men's and women's access to credit and information services should be collected.
- There should be increased emphasis on panel data (time series for individuals) to facilitate more detailed analyses of household behaviour over time.
- Income measures should be developed that are sensitive to the distinctions between money income that is paid or earned, spent, and subject to discretionary power.
- Develop social and environmental accounting and audits to link indicators for group and other organizations to the broader indicators (Anderson 1991: 94-95).
- A substantial portion of Statistics Canada's budget should be devoted to implementing gender-based analysis (GBA) and integrating it into on-going statistical activities.
- Statistics Canada should engage in meaningful consultations involving diverse groups of women, including aboriginal groups, about gender-based analysis and the needs of these groups for information. Results of these consultations should be published.
- Statistics Canada should include NGOs in its data liberation initiative. This will help users of data in the voluntary sector become better informed.

An even more extensive list of suggestions has been provided by Birgitta Hedman, of Statistics Sweden (Hedman and Perucci 1997: 4 ff.). At the same time she points out that the data gaps and biases apply to both men and women. It is the lack of information about their roles together and separately that defines the gender statistics problem.

Recommendations for Builders of Indicators

It is not enough to leave the statistical agency with recommendations. In the real world, it is the builders of indicators who will use the published data and participate in the debates about policy and other choices. The following recommendations are oriented towards the public and private institutions who are producing social and economic indicators.

- Analysis of gender-disaggregated information should be broadened to private and academic institutions (World Bank 1995: 63 ff.).
- Development of indicators for important, but difficult to measure, concepts such as democratic participation, strength of community life, observance of human rights, etc., are needed (Anderson 1991: 94-95).
- Sets of indicators reflecting differences in priorities for different groups (e.g., regional) should be developed.
- Adjustments in the calculations for differences in biological or “natural” differences should be made, and noted. For example, life expectancy for women may be longer by five years for biological reasons. To use relative life expectancy as a gender indicator may require a prior adjustment as is done by the UNDP.
- Gender **equality** indicators should be defined for those areas for which equality or a value of 1 is the desirable outcome. (This may not include an area like incarceration rates.) At the same time, gender **inequality** indicators that highlight differences may be usefully developed.
- Implicit models should be identified. Indicators based on several different models may be helpful.
- Builders of indicators should include a gender dimension in their work or clearly specify why they have not done so. For example, lack of data or demonstration that gender-based analysis makes no difference to the behaviour of the indicator should be required.
- Specific tools for incorporating qualitative information, utilizing feedback from people being measured, and validating the indicators are needed. Specific challenges are to represent the realities of women facing violence and insecurity.

Recommendations for Users of Indicators

A discriminating user is the best assurance that indicators appropriate to the issue at hand will be used. Some recommendations to that end include:

- Develop a consensus around a set of priority indicators as a base for increasing political influence (Anderson 1991: 94-95).
- Publicize the priority indicators (Anderson 1991: 94-95).
- Assess international institutions (e.g., World Bank, IMF G-7) in light of alternative indicators.

Discriminating users are the best assurance that appropriate indicators will be used.

- Users need to demand better documentation of the underlying models of indicators. They need evidence of any validation of the results from the use of the indicator. As well, sufficient information about the consultation process used in developing the indicators should be provided.

Recommendations for Decision-Makers

For gender indicators to influence decision-makers some changes are needed. In particular, decision-makers must be exposed to the availability of gender indicators and appreciate that outcomes can vary by gender group and within gender groups. Recommendations that may help to improve the acceptability of indicators include:

- Modify the machinery of government to be responsive to the priority indicators, rather than being focused only on some financial indicators.
- Proposals for research submitted by academics and others should, where appropriate, be required to give evidence that the work will include gender-based analysis (GBA). Departments that are currently attempting to implement GBA should be assisted in their efforts.
- Decision-makers at all levels of government, in the private sector and in the voluntary sector, must be held accountable for the use of gender-based analysis in their deliberations. This starts with their clear recognition that there are different determinants for the outcomes of different gender groups.

As a starting point for all initiatives and programmes, it must be assumed that gender makes a difference.

Other Recommendations

We were quite interested in the apparent success of Sweden, in providing gender-sensitivity training, starting with the Prime Minister and Cabinet members. This ensures that gender-based analysis and indicators are taken seriously, and that during policy discussions the important additional question – “And does that vary by gender?” – is also raised.

Training of providers and users of data is important. Politicians need training about gender sensitivity, and the uses of gender indicators and gender-based analysis. This training is needed if gender-based analysis is to become integrated into decision-making within government. Such training should be an integral part of the training for all federal public servants and federal politicians.

Although the primary focus of the Symposium was on improving gender equality indicators and our knowledge about them, we should not forget that the “knowledge” is needed not just for better understanding, but also to ensure that policy development is inclusive and works towards women’s equality. This message was evident throughout.

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Using Gender Equality Indicators: Steps to Best Practices

Background paper

by

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There are many different and equally valid purposes for social indicators. Indicators can be used to: monitor long-term social trends, identify problems, establish government accountability, measure the positive and/or negative effects of specific social programs, support public advocacy, provide a composite measure of social well being, etc. (Canadian Council on Social Development 1996, Bunch 1995.) While it is beyond the scope of this paper to discuss the inter-relationships among these various approaches, they are all useful and can build upon each other.

This paper focuses specifically on the construction of gender equality indicators that can be used as government outcome measures. We have chosen this particular application because it is not widely discussed in the literature and offers real potential for promoting gender analysis within the current environment of government renewal and restructuring that is occurring across Canada and throughout the world.

Demands for fiscal restraint and public accountability are forcing governments to rethink their functions and methods of operation, drawing initially on experience derived from private sector initiatives, but building increasingly on public sector experience (Schick 1996, O'Hara 1997: 13-15). Thus, changes in government operations have involved attention to quantifiable outcomes and results. Most government agencies are now incorporating business plans, redesigned work processes, benchmarking, best practices and quantifiable outcomes in their overall operations.

Successful change in government depends on the simultaneous progress of the two interconnected considerations of “doing the right thing” – effectiveness – and “doing things right” – efficiency; in other words, the nexus between means and ends. “Doing things right” is closely linked to performance measurement and fiscal sustainability. “Doing the right thing” relates to public accountability, outcomes and indicators. In the public sector, as much as in the private, the heightened focus on service and results supports movement away from monolithic, bureaucratic structures to more flexible and responsive forms of organization. Ideally, governments will work efficiently and effectively to meet the needs of their citizens, within a context of wider democratization and citizen involvement.

This paper proposes that gender analysis, in general, and gender equality indicators, in particular, are key elements in supporting the advancement of women's equality within the current context of governmental action. Further, the current context offers new opportunities for ensuring that women's voices are heard in the development and implementation of legislation, policies and programs.

Gender analysis and gender equality indicators are key elements in supporting the advancement of women's equality.

A review of relevant literature and, most importantly, interviews with Status of Women officials across Canada underlie this paper. The interviews were designed to elicit the experiences, opinions and suggestions of our colleagues in the effective use of gender equality indicators, and we are grateful for their insights. The contextualizing arguments (and any errors), however, are solely the responsibility of the authors.

The paper continues with a consideration of “best practices”: what do these mean in the context of the public sector? We move on through a consideration of six steps that define a process which, in our view, constitute the elements of “best practice” in the development and use of gender equality indicators. These steps are:

- Engaging Stakeholders in Concept Formation
- Building Consensus
- Defining the Concepts
- Integrating Indicators into Analytical Framework
- Communicating and Progressing
- Using the Indicators.

Best Practices

“Best practices” are the processes or procedures that are most effective in achieving desirable goals. Much of the discussion of best practices has arisen from the business community where goals include identifying and capturing new markets, delivering services more cost-effectively, gaining competitive advantage, and, in the final analysis, increasing profitability.

Mintzberg (1996: 77) has pointed out that the relationship between government and citizen is fundamentally different than the relationship between business firm and customer. For the most part, we recognize our relationship with the business community as transaction-oriented and contractually-defined. Our relationship with government, however, is much more generally oriented to expectations that government works in our best interests, for the wider public good.

While we have many transaction-oriented dealings with government, such as the purchase of motor vehicle permits or remittance of taxes, our primary role is that of citizen, not of customer (Mintzberg 1996: 77).

Government is expected to provide the infrastructure for the kind of society we want as citizens. We have every reason to expect government to be working in our best interest. This relationship between citizen and government creates a fundamental difference between “best practices” of government and “best practices” of business. While businesses are free to identify and use whatever market niches are most profitable for the company and its shareholders, governments must identify, understand, and accommodate the great diversity of citizens, balancing sometimes competing interests in the pursuit of best possible outcomes.

In consequence, “best practices” in government, and in the development of indicators, must take into account much more than technical requirements and single “bottom lines”. The following sections discuss issues for consideration at each stage of the development and use of gender equality indicators, to ensure that they are widely accepted and widely used to identify the opportunities for governmental and non-governmental action in pursuit of women’s equality.

“Best practices” in government, and in the development of indicators, must consider much more than the single “bottom lines”.

Engaging Stakeholders in Concept Formation

One of the most important criteria for the success of gender equality indicators is the development of measures that are widely accepted by various publics. *Social indicators should reflect goals toward which we can progress through both public policy and private behaviour.* Such coherent and concerted action is one of the most valuable contributions indicators can support. The more women across Canada are working together toward a goal, the greater the likelihood of progress. This conception directs our attention and informs the processes by which we can arrive at useful indicators. *If we are to build real commitment to gender equality indicators, ownership must be based within the community and throughout diverse government departments.* Experience has shown that success in promoting women’s issues usually depends on the simultaneous efforts of people working both inside and outside government (Karman 1996: 1).

If we are to build real commitment to gender equality indicators, ownership must be based within the community and throughout diverse government departments.

One of the most significant challenges in the development of social indicators is to engage all stakeholders in the process. Some people believe a statistical background is necessary. To avoid this perception we must not move too quickly to technical considerations of how the concepts will be measured. Women must first be free to discuss their visions of what they want for their daughters, their nieces, their granddaughters and the next generation of Canadian women without being hampered by questions of how this could be measured or whether or not the data is currently available.

Carefully designed gender equality indicators have the potential to transform individual circumstances into social concerns.

The success of such an approach is clearly illustrated by our increasing capacity to address issues related to women's unpaid work. Thanks to the efforts of women's groups, this matter was brought to the attention of policy makers and data gatherers in such a manner that improved measurement became a necessity, as reflected in the recent Census release on the subject, and, of course, in the *Economic Gender Equality Indicators* released by Status of Women Ministers last fall (Federal-Provincial/Territorial Ministers Responsible for the Status of Women 1997).

Building Consensus

Indicators are, by their very nature, a unifying force. *Carefully designed gender equality indicators have the potential to transform individual circumstances into social concerns.* For example, by presenting statistics on violence against women, we empowered women. We helped them say "it is not just me"; "it is not my fault". What people had identified as a private problem has become a social issue. Once identified as a social issue, violence against women can be addressed through social, legal, policy and program responses.

Indicators have the potential to unify citizens around issues because they refocus discussion from the abstract and anecdotal to the concrete and quantifiable. Points of contention that are heatedly debated without the benefit of empirical "reality checks" may disappear, or at least be clarified, when confronted with specific numbers. The presentation of statistical evidence can help both sides of an issue to see the other point of view.

For example, many debates related to formal and substantive equality for women can be informed by a clearer understanding of goals. Is our primary goal parity with men? Or, are we seeking improvements in the quality of life for women? To what degree do measures of individual economic status reflect the interdependencies which more accurately represent our existence as social beings? To what degree are such interdependencies consistent with personal autonomy and self-determination? To what degree do they reflect power imbalances between the two genders? Such questions do not require either/or answers, and solid indicators can help us sort out and work toward what we really mean by the advancement of women's equality.

The following hypothetical example illustrates how numbers are helpful in informing the debate with respect to the relative importance of seeking parity and improving the quality of women's lives. Let us say that the income ratio were to change from \$.50 income for women for every dollar of men's income, to \$.60 income for women for every dollar of men's income. Clearly, this represents increased parity between women and men. But does it represent an improvement in the quality of women's lives?

If women's average income were \$20,000 and men's average were \$40,000, we would have the \$.50 ratio. A narrowing of the gap, to \$.60, could have occurred in a number of ways:

- Women's income remained constant at \$20,000; men's income decreased to \$33,000.
- Women's income decreased to \$15,000; men's income decreased more sharply, to \$25,000.
- Women's income increased to \$30,000; men's income increased to \$50,000.
- Women's income increased to \$24,000; men's income remained constant at \$40,000.

While there may be dispute over the relative importance of achieving parity with men versus achieving improved quality of life for women, there would be much less disagreement about the relative desirability of each of the above scenarios.

Debates about social indicators have also included different perspectives on the role of objective measures, such as those related to income, and more subjective measures, such as those related to empowerment, locus of control and life satisfaction (Noll 1996: 7). An approach to indicator development which takes the desirability of inclusion of stakeholders and publics as a basic operating principle and which provides for a balance between macrosocial variables and their psychological correlates, is more likely to succeed in building and maintaining the consensus needed for gender equality indicators to become meaningful tools in the public policy process.

Defining the Concepts

At this point in the evolutionary process of government restructuring, the greatest potential for gender equality indicators depends on their

The inclusion of stakeholders and publics in the development of indicators is an approach likely to succeed in allowing gender equality indicators to become meaningful tools in the public policy process.

Gender equality indicators should be formulated as high level social goals, not as gauges of specific departmental or program performance.

construction and acceptance as outcome, not performance measures. *Gender equality indicators should be formulated as high level social goals, not as gauges of specific departmental or program performance.*

New Zealand led one of the first and most comprehensive efforts to redesign government, and among the lessons to be learned from that experience are those which relate to the level at which social indicators must be defined or operationalized to be useful outcome measures, for the country as a whole, not simply for its government.

Original reforms in New Zealand were based on the following conception:

The Public Finance Act 1989 defines the relation of outputs to outcomes in causal terms. Outputs are “the goods and services that are produced by a department, Crown agency, Office of Parliament, or other body”; outcomes are “the impacts on, or the consequences for, the community of the outputs or activities of Government.” In other words, outputs produce outcomes. (Schick 1996: 61)

While this conception was intended to establish accountability for government performance, it may have had unintended consequences. Schick, who evaluated the New Zealand reforms, argues that a clear distinction between outputs and outcomes is essential, because the relationship between outcomes and outputs is not necessarily or directly causal. Holding people accountable for outcomes that they do not, in fact, control, can result, for example, “in expedient escape routes; one of the most popular is to define outcomes so vaguely that progress cannot be measured.” (Schick 1996: 61)

Schick proposes the following alternative:

Outcomes are measures that indicate progress, or the lack thereof, in achieving public objectives.... Outcomes should be seen not as measures of impact, but as indicators of direction. They should be employed more for formulating policy than for maintaining accountability.... Particular outcomes may or may not be the product of outputs, but even when they are not, the government should take notice of them, analyse their significance, seek to explain what has or has not happened, and develop appropriate policy responses. (Schick 1996: 61)

Outcome measurement, and hence gender equality indicators, offer real potential for the incorporation of women's interests and concerns into governmental goals. However, as Schick points out, a key success factor is that indicators are formulated and defined as measures of broad societal goals, and are not reduced to the level of outputs or performance measures. Should the latter occur, we run the risk of entanglement in "doing things right" to the neglect or exclusion of "doing the right thing", which invariably requires concerted action across government departments, between government and community; in the public as well as in the private domain. Effective definition of concepts underlying indicators must proceed within a clear grasp of their application at the level of society as a whole.

Integrating Indicators into Analytical Framework

The shift toward an outcome directed approach in government forces a more analytical approach to policy and program development. If we are to work toward any outcome, our success depends on a thorough understanding of the conditions that are related to that outcome. One of the principal advantages of gender analysis is that it assists in the design of effective policies and programs by uncovering conditions related to a particular outcome. If, for example, we were concerned with reducing dropout rates in our schools, analysis demonstrates different dropout rates for boys and girls (Statistics Canada 1991). Furthermore, the reasons boys and girls drop out of school are shown to be quite different. In this and many other instances, gender analysis is critical to developing successful intervention strategies. As governments become more analytical and outcome focused, the opportunities for effective policy interventions resulting from gender analysis increase.

As governments become more analytical and outcome focused, the opportunities for effective policy interventions resulting from gender analysis increase.

For indicators to be most useful in policy development, they must be strengthened by comprehensive analyses grounded within a framework which ensures our continued progress toward gender equity. We must ask questions like: What happened? Why did it happen? Is this the direction in which we want to go? It is the analysis in many cases that helps us determine advantages and disadvantages of differing policy options, and may also allow the formulation of better policy alternatives.

We use the example of one of the recently released *Economic Gender Equality Indicators* (Federal-Provincial/Territorial Ministers Responsible for the Status of Women 1997) the total work ratio, to illustrate the above points, with the numbers being hypothetical, for illustrative purposes only. The total work ratio is composed of both paid and unpaid time. Consider the situation of a reduction in the total work index from 1.20 to 1.00. In

technical terms this would mean women had gone from doing 20% more work than men to doing the same amount of work as men. Is this a move in the right direction?

The table below presents some hypothetical numbers to describe how this change may have occurred. In general terms, the table illustrates an increase in time spent at paid work by both women and men, with corresponding drops in time spent on other activities: child-related work, relatives and friends, volunteer work and other household work.

Table 1: Hypothetical Example – Hours Per Week Time Allocation

	Time 1		Time 2	
	Women	Men	Women	Men
Paid work	20	40	35	45
Child-related work	20	10	10	5
Relatives and friends	15	10	4	2
Volunteer	15	10	2	2
Household	20	5	10	7

A more comprehensive analysis of the conditions behind these changes would be needed to identify the direction that needs to be taken in terms of policy development. The following scenarios describe two very different conditions under which such changes could have occurred. These different conditions would also point toward different policy directions.

Scenario 1: It could be that the increased hours of paid employment for both women and men was created primarily by financial pressures that were felt most strongly in families with small children. As a consequence of spending so many hours commuting and working away from home, people had little time left to spend with their children, families, friends, or in volunteer activities. This scenario would have serious implications for social policy in areas such as the National Children’s Agenda and Health Care Reform. What are the effects of ever increasing hours of paid employment on the well being of our families and communities? How successful will co-ordinated home care be if there are no family members available to assist with this care?

Scenario 2: Another plausible explanation for such a change could relate to changing demographic profiles. It may be that the average number of hours of paid employment has increased because a large proportion of the population has reached an age where their children are older and they want to devote more time to paid employment. However, this increased work effort in the 40 to 60 age group could be blocking the employment prospects of those in younger age groups. The relevant policy questions under this scenario would be quite different from those developed under scenario 1. Are fertility rates dropping because of increased unemployment, non-standard work and lower income among those persons of child bearing age? Are we facing a skill shortage when the 40 to 60 age cohort retires because of the lack of relevant work experience within the following cohort?

Clearly, the policy directions to be taken would be very different under scenario 1 and scenario 2. *While indicators are important for monitoring long-term social trends and identifying potential problems, their application to public policy depends on the integration of such indicators into a broader research framework that includes the deconstruction of contributory components and the detailed analysis of underlying conditions.*

Once again, there are lessons to be learned from the New Zealand experience. Criticisms are directed toward the strict adherence to strategic plans because such rigid procedures diminish the capacity of the organization to be future oriented and to respond to emerging concerns (Mintzberg 1994).

The government is interested not only in current outputs but in each department's potential to produce the services that may be wanted in the future. This capacity requires the department to plan for the future, adjust its objectives, priorities and resources to meet the opportunities and demands it may face, and make necessary changes in its organization and operation. "Strategic capacity" refers to this process of purposeful, directed change. (Schick 1996: 53)

Strategic capacity depends on detailed analyses of underlying conditions or contributory factors. Our ability to predict and make the modifications necessary to accommodate future trends depends on the strength of our analysis of underlying factors and conditions. High level indicators are useful in alerting us to troubling trends, such as increases in child poverty. More detailed analyses are needed to identify accurately ways

The application of indicators to public policy depends upon their integration into a broader research framework that includes the deconstruction of contributory components and the analysis of underlying conditions.

to prevent these problems from escalating. If the increasing incidence of child poverty is tied to the increasing incidence of poverty among female-headed lone-parent families, preventative measures for child poverty would necessarily involve a close examination of the economic circumstances of lone-parent mothers (Nova Scotia Women's Directorate 1995: 5-6). If we could predict that certain policy or program directions would have economic benefits for lone-parent mothers, we could demonstrate how such measures would not only directly benefit women but would also indirectly benefit their children and thus strongly support the National Children's Agenda. It is very difficult and time consuming to make changes in public policies once they are in place. *Our greatest chance for success is to seize opportunities during the policy development stage, rather than after the fact.* The more thorough we are in our understanding of the conditions that underlie changes in social indicators or outcomes, the more likely we are to be able to work for preventative measures before problems arise or get worse. Corrective measures are time-consuming and costly, both economically and socially.

Communicating and Progressing

The nature of social reality is such that no quantitative model will capture its richness, its evolutionary and changing character, its essential indeterminacy. Given this premise, we conclude that indicator development is an ongoing process, raising the necessity of managing a number of paradoxes and dilemmas. On the one hand, for example, we want to have indicators that consolidate variables measured over time so that we can understand trends and predict future outcomes. On the other hand, we need to constantly revisit indicators to ensure that they continue to reflect the real interests and concerns of the women of this country.

The relevance of indicators depends on comprehensive communication to promote continuing discourse among stakeholders. The vast array of audiences would include: the general public, women's groups, the media, government policy analysts, elected representatives, and the United Nations. *While no one presentation format is suitable for all audiences, thorough technical and analytical background information can form the basis of multiple approaches all of which carry the same essential messages.*

For all stakeholders, indicator acceptance and usage depends on trustworthiness and transparency. The reality the indicators point to must be as clear and unambiguous as possible. Both governmental audiences and public audiences must concur with the conclusion that gender equality indicators are a valid numeric representation of what we believe equality

Indicator development is an ongoing process, raising the necessity of managing a number of paradoxes and dilemmas.

and fairness to be. Building such trust requires a presentation of information that is readily understood and “speaks to people” (Canadian Council on Social Development 1996: 26).

We have all heard about “lies, damn lies and statistics”. With the growth of the knowledge economy has come an increased use, and misuse, of statistical information. The public now harbours a healthy skepticism toward the statistician’s wares. *It will take the combined expertise of academics, policy analysts, and statisticians, working in partnership with community stakeholders, to create numeric representations of complex concepts that are understandable and trusted.* For example, the credibility of the existing economic gender equality indicators is enhanced by the partnership of the Federal/Provincial/Territorial Forum of Status of Women Ministers with Canada’s world-renowned and respected statistical agency, among our co-hosts at this conference.

It is beyond the scope of this paper to enter into the complexities involved in communicating to such diverse audiences. However, we will offer a brief discussion of methods for approaching the media and the public because these are such important audiences for widespread distribution and usage. Gender equality indicators and their associated background information can be very useful as quick responses to media stories reporting sensational anecdotes. For example, a recent opinion column by a family lawyer vehemently attacked women’s claims to spousal support. She writes:

... the wife can always find some reason to claim spousal support. If she worked outside the home and supported her husband while he became a brain surgeon, her claim is for “compensatory support”. If she did just the opposite, sitting around eating bon-bons while the brain surgeon supported her, her claim is for “developing a pattern of economic dependency”. (*Daily News*, February 12, 1998)

Gender equality indicators and the analyses which form their underpinnings enable us to counter bias and misinformation, starting at a more abstract statistical level and working down to stories that illustrate the realities of women’s lives. The following points, once again based on hypothetical numbers, exemplify the approach that could be taken to respond to the aforementioned media coverage:

- the case proposed is anomalous

The analyses of gender equality indicators illustrate the realities of women’s lives.

- on average, women who do not work outside the home spend almost twice as much time as men doing unpaid work (bon-bon eating not included)
- women who do not work outside the home spend an average of 12 hours a day on unpaid work including housework and child care
- only 1 in 3,000 Canadian women who do not work outside the home spend less than 3 hours a day on household work
- the typical day of a full-time homemaker is more like Mary Smith's than our learned friend's bon-bon eater
- followed by interview with Mary Smith.

The anecdotes and stories that are essential in communicating with our varied publics must be selected on the basis of their truthful reflection of the conditions underlying gender equality indicators. They must be stories based on widely-shared experiences, rooted in the realities of Canadian women, representative of our collective knowledge, leading to consensus for solutions. By ensuring that such stories and gender equality indicators mutually inform each other, we assist citizens in fulfilling their roles as active and informed participants in a democratic country. Easily grasped numbers and personal stories provide a good combination for sticking in people's minds. These types of communication strategies will be useful in making higher level gender equality indicators meaningful to broader audiences.

Using the Indicators

Gender analysis is consistent with the leading edge of policy formation. Gender analysis is based on a clear articulation of policy goals, responsiveness to disparate impacts on different population groups, and identification of means to achieve goals within sustainable levels of governmental expenditure. Adequate gender analysis demands more than the disaggregation of statistics, more than "gender breakdowns". It requires real strategic thinking directed toward the accomplishment of real goals and outcomes. High level indicators provide focus and direction to this more fluid approach.

Gender analysis requires real strategic thinking directed toward the accomplishment of real goals and outcomes.

Some of the obstacles we face with respect to integrating gender analysis into government work occur precisely because this approach is on the leading edge and slightly before its time. Good gender analysis cannot be reduced to a specific formula but is dependent instead on the creative capacity of analysts to examine policies in light of their potential for

progressing toward the outcomes or goals of social equity and justice. What appear at the moment to be our greatest obstacles may soon, however, become our greatest assets. As with any new process, people in government are struggling with how to make outcome-based measurement work. The lessons learned from developing and implementing gender analysis put women in a good position to be leaders in this field. A number of Status of Women officials from across the country commented on the importance of getting in on the ground floor for the development of government indicators. The expertise gained from the gender analysis perspective can serve to move women's issues from the periphery into the core of government outcomes.

Indicators, as the word implies, point out directions for action. Indicators are signposts, and it is important to look at signposts before setting out on a journey, as opposed to back-tracking. A consistent response of Status of Women officials interviewed in connection with this paper was that it is essential for gender analysis to occur at the outset of policy development, when the agenda is being set. Again, indicators can be useful in establishing the policy agenda in both social and economic realms. And the "best practices" proposed in this paper ensure that those indicators are convincing, that they mobilize public support, that they further social cohesion around the core values of our democratic society.

It is important to look at indicators as signposts before setting out on a journey, as opposed to backtracking.

Our challenge and opportunity is to build on the economic gender equality indicators already produced. We can involve others in the process of further refining them. We can work toward strengthened consensus around the indicators as reflective of our missions, of advancing equality, fairness and dignity for all women. We can carry out the analyses needed to explore the social dynamics underlying the indicators. And we can effectively communicate our findings to the Canadian public, reinforcing the public expectation that the advancement of women's equality remains high on the nation's agenda, both internationally and domestically, for every order of government.

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Conceptual Issues, Technical Problems, and Statistical Integration Questions in Work on Gender Equality Indicators

Background paper

by

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Introduction

This document is an outline of topics and related issues, designed to provide the participants in the workshop on Theme IV with ‘raw materials’ for building discussion that may lead to recommendations about practices in the development and display of gender equality indicators. Our original plan was to prepare a formal discussion paper whose major sections would be delineated in terms of responses to the following broad questions.

- What subjects should be covered by gender equality indicators?
- On what dimensions of the subjects do we need decisions?
- How should the indicators be displayed?
- What are the technical hurdles to improved integration of gender into prominent accounting systems?

Unfortunately, our heavy involvement in the marketing and operational planning for the symposium has used up the time that was needed to produce a formal discussion paper. While abandoning the project of producing a formal paper, we have kept a strong focus upon the need to stimulate discussion upon important technical and conceptual issues that exist for the whole field of gender equality indicator development. What follows is a series of notes which attempt to identify some of those issues, along with occasional illustrations of specific aspects of the issues. The notes are organized under the broad questions listed above.

What Subjects Should be Covered by Gender Equality Indicators?

A review of several publications of statistical series for gender equality indicators indicates a wide range of subjects, and related variables, with respect to which such indicators may be defined. There are several alternative ways of classifying these subjects. The following is one example derived from our review of documents that present gender equality indicators.

- Income, wealth and poverty
- Health: e.g., physical, emotional, spiritual
- Education: e.g., formal and informal
- Paid and unpaid work
- Leisure: e.g., time alone, sleep and rest time, and free time
- Justice: e.g., perpetrators of crimes, victims, legal decisions

Policy issues and priorities relating to gender balance should guide the taxonomy of indicator subjects.

- Human rights
- Power and control
- Freedom and safety

Simply presenting a catalog of possible subjects for gender equality indicators based upon what one finds in the literature is not adequate, however. Work on producing indicators usually takes place within a specific political jurisdiction. When that is the case, the list of subjects should emerge from decisions that are made in response to some basic questions. Among them are following questions. In what aspects of the organization of a society (community), and for what dimensions of the development of men and women within the society, do we care about gender balance? If government and corporate policies are to be developed concerning those aspects and dimensions, where should the available resources and effort be most heavily concentrated? In other words, for policy purposes, what are the priorities among the said aspects and dimensions?

We should address such questions before drawing up lists of subjects for the creation of gender equality indicators, that is, lists such as the one shown above. Within the context of our responses to the basic questions, we can inspect a particular proposed list and ask the following questions: What subjects are omitted? What subjects might be dropped because of lack of policy relevance? Given limited resources for statistical and conceptual research and development, what indicators should be developed first? What classifications of the subjects are most suitable?

On What Dimensions of the Subjects Do We Need Decisions?

The simple question stated above, as the heading for this section, masks some very deep or complex issues that need to be stated explicitly, so that collective decisions about them can be sought. The following is a selective listing of these issues.

What Kind of Gender Equality?

What kind of gender equality is sought: equality of opportunity or of results?

What kind of gender equality should we seek? Among the possibilities are equality of opportunity and equality of outcomes or results. But these two, about which much has been written, are but a beginning of the alternatives ways of addressing the question just stated.

Another key aspect of the question concerning what kind of equality was stressed in the recently released *Economic Gender Equality Indicators*. Often implicit in the adoption of a gender equality goal is a standard of performance or achievement. What is that standard? Do men and women have equal power in setting that standard? If, with respect to the performance or achievement in question, there are evidently different male-oriented and female-oriented cultural value systems, is one these systems dominant in setting the standard? If so, is that what we want? If that is not what we want, what is the standard that would emerge from less dominance of one of the two cultural-value systems?

What performance standard is best; who should define it?

Speaking about “what we want” should not be seen as a suggestion that collective decision making and consensus can be achieved without enormous difficulty and tension among parties that have competing interests. On the contrary, it should be assumed that the answer to “what we want” emerges from a normal of process of political competition among interest groups, and that can often be much like bloodless warfare.

In short, buried deep under a project to create gender equality indicators is a set of positions about what kind of equality matters. Often related to a given position is a performance standard, and the issue as to the dominance of male-oriented or female-oriented cultural value systems in the setting of that standard can become relevant. From time to time, at least, it may be healthy to bring these underlying positions, standards and standard-setting criteria to the surface for inspection and debate. A feature of *Economic Gender Equality Indicators* is the fact that it alludes to this process as something that may be overdue in Canada.

It may be healthy to debate underlying positions, standards and standard-setting criteria before deciding on which ones will guide the indicator development.

What Level of Spatial (Geographic) Detail?

At one extreme indicators could be produced for sub-provincial areas, or groups of sub-provincial areas such as all census metropolitan areas in a province, or rural and urban areas. At another extreme, indicators could be produced for Canada only.

Inequality for one regional system may disappear (because of the effect of averaging) at a higher level of aggregation.

What Time Points and Time Periods?

The alternatives regarding the temporal dimension include annual, quinquennial, occasional. The minimum length of time series is also a relevant issue.

At one extreme monthly indicators could be produced drawing on data sources such as the Labour Force Survey. At the other extreme indicators could be produced every census year.

Many indicators not requiring sub-provincial detail could be produced on an annual basis because the source survey is either annual or more frequent. Notable exceptions are the time use surveys (1981, 1986, 1992, 1998) and the Longitudinal Survey of Children and Youth (every two years beginning in 1994).

What Level of Subpopulation Detail?

Lurking behind the question just stated are some significant policy and program issues that are linked to particular sub-groups of the population. These include, for example, persons living alone, single parents, age groups (children, seniors), immigrants, ethnic groups, language groups, aboriginal Canadians, etc.

To take the example of a neglected subpopulation in the area of gender equality indicators, do we need special indicators of the differences between girls and boys on their academic performance, especially in mathematics, their tendencies to direct or indirect aggression, their use of drugs, tobacco or alcohol, their participation in civic or informal education, or household chores? With the new Longitudinal Survey of Children and Youth, there are opportunities for producing many new indicators, but how important are they in relation to the other subjects?

What Should be the Reference Population?

A difficult issue of reference group selection raises its head whenever we ask whether men benefit more than women, or vice versa, from having had a certain experience or opportunity. The problem arises whenever benefit is determined only by comparing a group that had the opportunity with another group that did not have the opportunity (or one who had a great deal of the opportunity versus one that had little of it). The group that did not have the opportunity, or had little of it, is the reference group for the purposes of measuring benefit from the experience or opportunity. If a sub-set of men is the reference group for measuring the benefit among men, and a subset of women is the reference group for measuring benefit among women, then the measurement of the gender difference in benefit, as measured, can produce results that are very difficult to interpret. This is an important problem whenever there is a tendency to measure benefit using reference groups in the manner just described.

To illustrate this problem let us review our experience with comparing men and women as regards income returns to education. At the end of that experience there was a consensus that the results were too difficult to explain to the public, and we were left with two unanswered questions. When measuring returns to education and other kinds of investments, what should be the reference population? Who should decide the answer to this question?

An example of a problem regarding choice of reference population: measuring the returns to investment in education for women and men.

Our problem arose because the mean income of the reference group among women was much lower than that for the reference group among men. To put the difficulty in its simplest terms, when highly educated men and women have roughly similar incomes, the measure of benefit, using the reference group approach, showed women far ahead of men. Yet this was partly a statistical product of the choice of reference groups.

In the case of the income returns to investment in education, our analysis showed that women in all provinces and in each of three years were estimated to have much greater returns to investment than men; but this result was partly because of the reference population used. The age range was 20-64 and all women and men with positive earnings were included in the calculations.

Our first estimate of the rate of return on investment in education was obtained directly by a method that is accepted in the literature. Under this method the earnings (wages and salaries plus self-employment income) of women and men were estimated by years of schooling and the potential labour market experience.¹ Specifically, to obtain the first estimate, an equation was estimated for women and men separately with the following form:

On measuring the returns to investment in education using a method accepted in the literature, we find that the result is a misleading indicator.

$$\text{Ln } Y = a + bS + cE + dE(\text{squared})$$

where Ln Y is the natural log of earnings of an individual, S is the years of schooling, and E is the potential years of labour market experience. E is measured by age, less years spent in school, less six, the assumed age at which schooling is begun.

The estimated b coefficient was then the estimated percentage change in earnings, given a one year increase in schooling: the estimated rate of

¹ The method is described in Pscharopoulos, G. (1987). The Cost-Benefit Model. In G. Pscharopoulos (Ed.), *Economics of Education Research and Studies* (pp. 342-347). Oxford: Pergamon Press.

return to investment in education. For the year 1994 and at the Canada level, the rate of return was estimated to be 0.34 (or 34%) for women, and 0.162 (16.2%) for men.

A gender equality indicator was defined as the ratio of the b coefficient as estimated by the equation for women (in the given year and province or territory), to the b coefficient in the corresponding equation that applied to men. The result was $0.340/0.162 = 2.1$, meaning that the estimated returns to investment in education for women was just over twice as great as that for men.

It was thought that this method resulted in estimates that were too high for women because it did not control for the fact that some women would have extra low earnings either because they were single mothers, or because they had preschool children. This method was therefore modified so as to control for these two family situations. The modification involved the addition of two variables to the above-specified equation:

LPARENT = 1 if respondent was a lone parent, and 0 otherwise

CHILDL6 = 1 if there were children six years of age or younger in the respondent's family, and 0 otherwise.

At the Canada level the modified b coefficient, computed after adding those two variables to the model, equalled 0.302 for women, and 0.159 for men. The defined indicator, the ratio of the b coefficients, became $0.302/0.159 = 1.9$, meaning that the estimated return for women was just under twice that for men.

The fact that the revised indicator was not much lower suggests that other factors may be at work that tend to increase the estimated rate of return for women more than for men. An interpretation in terms of the human capital approach may be found in the work of Vella.²

An alternative explanation of the male-female earnings gap points to discrimination by employers, fellow workers or consumer preferences as the main cause: "Underlying these large pay differences are the continuing segregation of work by sex, a sparsity of promotions for women, and differences in respect accorded men and women. ... Because of their lack of access to all jobs on an equal basis, women have a disproportionately small share of the interesting jobs, of the jobs that allow a person to grow

² Vella, F. (1993). Gender Roles, Occupational Choice and Gender Wage Differential, *The Economic Record*, 69 (207): 382.

and to advance”.³ Furthermore, women receive less employer supported training than men.⁴ If discrimination affects less educated women more than higher, (either because they are less able to argue for fair treatment or have less bargaining power, or because their employers and fellow workers are less sensitive to issues of fairness) then discrimination too would contribute to a higher rate of return to investment in education for women than for men.

The literature⁵ suggests the following specific factors may contribute to higher returns for women to investment in education: Many of these are not reflected in our modified method. Two such factors are job experience and career interruptions.

Experience: Men have more job experience than women, and this factor explains in part their higher wage or salary rate. Where data on job experience is lacking, the age, or age from school graduation, is used as a proxy measure, though this measures only potential experience, potential under the assumption that there had been no breaks in paid work experience since graduation. It also assumes that the schooling was undertaken in one continuous set of years. Both these assumptions tend to be weaker for women than men because mainly of work interruptions on account of child rearing. Usually, no direct measure of experience is available. The relationship between age and income is nonlinear, with income increasing with age up to a certain point, then levelling off or falling. The turning point in this curve, and the curve's height, varies with the level of education and gender.

Career Interruption: Women are much more likely to interrupt their careers for family reasons (usually the care of young children) than men. During such work absences, promotions may have been missed, and training opportunities lost, along with certain job skills. Such disruption of career is therefore alleged to result in a lower wage or salary rate on return to a paid work situation, than would have been the case had their been no career interruption. Women with lower education levels tend to be much more likely to drop out of the labour force for family reasons than women with higher levels of education. For this reason, the return to investment in education will be higher for women than for men.

Female-male differences in job experience, education experience and career interruptions affect less educated women more than highly educated women.

³ Bergman, B.R. (1989). Does the Market for Women's Labor Need Fixing, *Journal of Economic Perspectives*, 3 (1): 43-60.

⁴ *Ibid.*, p. 45.

⁵ These factors and others are discussed in Gunderson, M. (1989). Male-Female Wage Differentials and Policy Responses, *Journal of Economic Literature*, XXVII: 46-72.

The result of a greater return to investment in education realised by women over men is found in several other studies when the standard methods are used. One exhaustive review of the literature found such a result in studies for Germany, Brazil, Columbia, Greece and New Zealand,⁶ although there were some exceptions. The author of this study notes “In fact such results are not surprising since it is not the absolute earnings of men and women that are under comparison in a rate of return calculation, but the absolute earnings of more and less educated *women*”.

This means that the selection of less educated women to be the reference group for measuring women's returns to education can be very controversial. *What should the reference population be for such an indicator?*

The reference group problem is illustrated by the example of female-male earnings differentials.

Another kind of reference group problem is also important. The measure we obtain for women and men on a given variable, earnings being an excellent example, can depend strongly on the compositions of the groups of women and men involved in the measurement. Since certain aspects of composition influence the measure, statisticians tend to want to hold these aspects constant when comparing men and women. In the case of earnings, statisticians have popularized the use of full-time full-year employees when measuring the earnings differential between men and women. However, that, in fact, is a deliberate choice of reference group.

Now if certain societal forces tend to make women less likely than men to be full-time full-year workers, we cannot understand, or even observe, the operations of those forces in determining women's economic status by limiting our analyses to full-time full-year employees. The limitation then becomes more than a statistical convenience. It takes on the force a paradigm, a lens that filters out certain classes of factors as being irrelevant to analysis before we even begin the analysis. To what extent are women, men and society being well served with this sort of paradigm, or reference group selection? The answer to this question may quickly take us into the realm of ideology.

In short, decisions regarding the appropriate reference group are fundamental to the nature of the indicator produced and how it varies over time. We come, therefore, to the following question. Who, or what group or body, should have the responsibility of making such decisions, and defending them publicly if required? Or is the decision best made by seeking a consensus among interest groups, or allowing it to emerge from interest group competition?

⁶ Pasacharopoulos, G. (1973). *Returns to Education: An International Comparison* (pp. 68-69). San Francisco: Jossey-Bass.

How Should the Measure of Equality be Designed?

Agreement about the variable to be observed for measurement of gender equality, and about the relevant reference groups, still leaves us with a wide variety of choices concerning the mathematical and statistical properties of the measure of equality. This variety takes us into a world where alternative formulas can give different patterns of variation among population groups, or over time in the same population group. Unfortunately, this can quickly open up opportunities for indicators to show what we want them to show.

For example, in *Economic Gender Equality Indicators* we wanted to take into account certain differences in composition between the male and female populations when comparing mean incomes. We were required to reject the approach of choosing specific reference groups, such as full-time full-year employees with specific occupations and family compositions. The method we chose was a derivative of the technique of direct standardization in demography. It can be explained very simply with the following example.

An example of how to take into account differences in composition between female and male populations when comparing mean incomes.

The process of taking into account these special concentrations of women can be illustrated with one of the factors – age. Women are more highly concentrated at the older ages than men.

Suppose we broke age into 10 categories and calculated an average income for women in each category. Add those 10 averages and divide by 10. The result would be the same as the overall average income for women if women were equally distributed among the 10 categories.

Now repeat the process for men. The result is that we have two averages, one for each sex, where it is assumed that each sex has a population that is equally distributed over the 10 age categories.

Now calculate the ratio of the female to the male averages, to get a new “adjusted” gender equality index. Because men and women are not, in fact, equally distributed over the 10 age categories this new index is an artificial number. *However, the difference between this new index and the one originally computed (the unadjusted index) gives you an idea of how far the gender gap would close if the populations of men and women were each equally distributed over the 10 age categories.*

Hence the purpose of the calculation is to test the extent to which certain distributional differences between the male and female *populations* might explain the gender gap indicated by the unadjusted index.

The only difference between the illustration just given and what was done for the *Economic Gender Equality Indicators*' report is that the calculation makes use of five variables simultaneously: age, occupation, education, employment status, and presence of young children.

Using those five variables broken down into selected numbers of categories, we conducted the same kind of computation as that cited above in the illustration. But now instead of 10 age categories we have as many as 1,536 categories (multiply 4 by 16 by 4 by 3 by 2). However, we consider only those categories in which there is a non-zero income average. So, in any region where there are only 800 (out of the possible 1,536) categories with non-zero income averages we add them and divide by 800.

In effect, the "adjusted" index values assume that the populations of women (or men) each have equal distributions over the selected categories of the listed variables *all taken simultaneously*, provided that we consider only categories that actually had people in them. When we speak of having "equalized the distributions" of men and women, in arriving at the adjusted index values, this is the sort of equalization that is meant.

Thus, the adjusted index value is an artificial number. By itself it has no substantive interpretation. However, the difference between its value and the unadjusted index gives you a rough and ready way of gauging how far the gender gap would close if men and women had "equal distributions" with regard to the variables listed above.

What we want to note here is that this way of taking into account the differing distributions of the male and female populations on selected compositional variables is very different from multiple regression strategies that are common in the economics literature. There sex would be a variable among many in a regression model, and what would matter is the coefficient for sex when all the other variables are held constant. This is the general idea.

The point to emphasize here is that we might have produced different patterns of variation in the measure of gender equality depending on the mathematical and statistical properties of the procedures used to take into account the gender differences in population composition.

We must also take note of the ages-old problem of arbitrary selection of weights in designing index numbers. A clear case of this sort arises with the measure of gender balance in work *pattern* that was developed for *Economic Gender Equality Indicators*. Here is an exposition of the measure.

The balance index used was, for the sake of simplicity, based on the paid work and unpaid work indices. Let us call “PWI” the paid work index, and “UWI” the unpaid work index. The balance index is obtained by applying the following formula:

$$[0.5 * \text{Abs}(1 - \text{PWI}) + 0.5 * \text{Abs}(1 - \text{UWI})],$$

where “Abs(x)” means the absolute value of x. Thus “Abs(1-PWI)” means the absolute value of the one minus the paid work index. Since either index (PWI and UWI) can be less than or greater than 1, the Abs(x) function allows you to ignore the direction in which the index deviates from 1 (the position of complete balance). The balance index simply averages the two deviations, and is a summary measure of the gender gap in work *pattern*, an important supplement to the summary measure of the gender gap in work *load*.

As is well known, because market valuations reign in paid work but not in unpaid work, while the latter is as crucial for social well-being and cohesion as the former, the policy implications of a major gap in work *pattern*, as indicated in the balance index, are quite substantial. We can use the balance index to judge whether, over time, work patterns are becoming more or less gender-balanced.

With total workloads being extremely similar between men and women, the gender-balance in work *pattern* is *the* area of key concern for the improvement of women’s status. Policy may work to improve the balance, or it may work to make the work-valuation systems within the two domains more comparable, or both.

It is quite apparent that both the mathematical structure of the measure and the weights used were subjects of professional judgment. There is a potential for different patterns of variation to be shown by altering structural aspects of the measure, or the weights.

Overall Measure of Gender Equality?

Is there value in seeking a GDP-type summary (or overall) measure for gender equality? We state this question in case there may be interest in discussing its aspects in the symposium.

Should Perceptual or Subjective Indicators be Used to Complement Objective Indicators?

This is a very important question. The interpretation of objective indicators often requires that ‘experts’ make judgments about the

circumstances of the people to whom the measures pertain. Those judgments could present a very different picture from the one that emerges when the people themselves are asked to offer their perceptions of their circumstances.

For example, should indicators be produced that would highlight female-male differences in the perceived satisfaction with various dimensions of life experience? These dimensions might include the perceived safety when walking alone at night, perceived satisfaction with income (to complement an objective gender income equality indicator, for example) or perceived overall happiness or well-being.

How Should the Indicators be Displayed?

What Information About the Source Data and the Design of the Indicators Should be Provided?

Information on the source survey and sample, definitions of component sub-populations, formulas and methods for indicators, are often required if one is to understand fully what an indicator is measuring, and why it shows a certain pattern of variation. It is clearly desirable to reveal such information as a matter of principle. In practice, however, only a handful of specialists are likely to know how to interpret the information. There is, here, a major challenge to make the indicator construction process more transparent in ways that the public can comprehend.

Should Indicators Using Alternative Data or Methods be Produced to Complement the Main Indicators, Even at the Expense of Producing Conflicting or Confusing Information?

In some cases alternative data or methods yield different results which may call into question the validity of the chosen indicator. In other cases different data or methods yield consistent results. The interpretation of the results of alternative indicators could present serious problems. What type of interpretive notes should be provided along with the indicators?

Should the Literature Regarding the Determinants of the Indicator be Summarized so as to Aid in Interpreting the Results, and to Help in the Policy and Program Design Process?

In the case of income inequality by gender, there exists a large literature regarding why the inequality exists or persists. Often there are competing theories with very different implications for public policy. Should this literature be summarized so as to help the policy maker and help the analyst interpret the results, or would such explanations only confuse the issue?

When Should the Reasons for Changes in the Indicators be Investigated and Reported?

When the indicators are moving in a direction opposite to that expected by policy makers, the need to analyze reasons for the changes may be irresistible. Analysis is also needed when the indicators are moving in expected directions but for reasons that are contrary to popular belief, or for reasons that are not well understood or are subject to challenge. Generally, what to do about the changes may not be discernible without analysis of the changes.

What Should the Reliability Standard be, How Should Reliability Information be Presented, and Should Data for Jurisdictions Not Meeting the Standard be Dropped?

For example, in some cases the coefficient of variation of estimates used in the formation of an indicator is such that the estimates would be considered too unreliable to publish by Statistics Canada's current standards. Yet the inequality between women and men might be so large and consistently revealed in different sub-populations that it would seem not in the public interest to suppress such an indicator.

Also, there is the inevitable pressure to show data for all jurisdictions if data for any of them is revealed. However, the implications of yielding to this pressure, when there is wide variation among the jurisdictions in the variability, or potential bias, of the patterns have scarcely been explored to date. Lurking behind this general concern is the following practical question. Should estimates based on small samples of smaller provinces be suppressed if they do not meet the normal criteria for release of statistics?

What are the Technical Hurdles to Integration of Gender Into Prominent Accounting Systems?

We have totally lacked the time needed to explore this important question. It cannot be ignored, and is stated here as a possible stimulus to useful discussion in the symposium. That discussion may take up questions such as the following. What would be the nature of a more gender-sensitive GDP? What would be the nature of a more gender-sensitive General Progress Indicator?

Concluding Comment

As we emphasized at the outset, this document is not a conference paper in the ordinary sense. We have set forth no central issue. Thus there is no thread of argument running through the paper, and to which we can now offer a central conclusion to end the paper. Rather this document is a collection of mini-discussions that are designed to be stimuli, or teasers, of hopefully fruitful discussion and recommendations in the symposium.

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New Challenges in the Improvement of Gender Statistics¹

Background paper

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Gender Statistics – A Field with Specific Characteristics

In the last 20 years, production and dissemination of gender statistics have improved significantly. Gender statistics has evolved as a field with specific characteristics – data collected on the basis of concepts and methods that take in consideration women's and men's roles and situations in all spheres of society, and presented and analysed to reflect gender issues. An international network of statisticians and users has developed a common strategy on how to produce and disseminate gender statistics and a number of national statistical offices have launched important efforts in this field and adopted international recommendations.

Initial efforts have concentrated on a better use of already existing data, through the development of user-friendly statistical products and a wider dissemination of statistics to reach all interested users – especially policy makers. Much has also been achieved in the improvement of concepts and definitions recommended at the international level and in the development of more suitable ways of data collection – formulation of questions, use of an appropriate language, training of the enumerators, among other aspects regarding data collection instruments.

Initial gender statistics efforts have resulted in better use of available statistics.

Today work on gender statistics is not only focused on data presentation and dissemination but regards more than before the improvement of data collection to address data gaps. Moreover, there is wider recognition that biases and data gaps apply to men as well as women – especially on men's roles in the family as husbands and fathers and in their roles and responsibilities in the household – and that gender statistics concerns women and men to the same extent.

Some problems of data quality and some data gaps identified when work on gender statistics started are still unresolved and some new areas generally not included in the production and analysis of official statistics have only begun to be explored. This paper addresses some of these old and new challenges for gender statisticians.

Measurement and Valuation of Paid and Unpaid Work

The collection, analysis and dissemination of data on women's and men's actual contributions to society and their working conditions is among the crucial areas where improvement in gender statistics is most urgently needed. To this end, the Platform for Action adopted by the Fourth World Conference on Women in Beijing 1995, recommends the improvement of data collection on the full contribution of women and men to the economy and the development of 'a more comprehensive knowledge of all forms of work and employment'. The areas of work can be summarised as follows:

The Fourth World Conference on Women in Beijing 1995 states the need for improved gender statistics.

Measure the full contribution of women and men to the economy.

- Measurement of unpaid work already included within the production boundary of the System of National Accounts (SNA). This includes the production and storage of agricultural products and other primary products in the household for own consumption, the processing of primary products and other kinds of processing (weaving clothes, production of pottery, etc.).
- Measurement of unpaid work not included in the production boundary of SNA. This includes caring for dependents, rearing and educating children, preparing meals, cleaning and decorating the house.
- Measurement of women's and men's participation in the informal sector, identified by the 1993 ILO Resolution as household enterprises owned and operated by own-account workers or employing a few employees (below a given limit) and usually not registered.
- Measurement of women's and men's working conditions, in terms of occupational segregation, wages, and career opportunities.
- Measurement of unemployment and underemployment, in terms of adequacy of time worked and income earned.

The paucity of data on these areas is given by a number of factors:

Existing concepts, definitions, classifications, measurements and analysis must be reviewed.

- First, national statistical authorities often delay the adoption of international standards and recommendations.
- Second, given the complexity of women's work, where paid and unpaid activities, within and outside the production boundary of SNA, overlap, it is very difficult to accurately measure their situations with conventional data collection methods, even when concepts and definitions are adequately set.
- Third, conventional methods of data collection do not usually capture most people, working in the informal sector, where activities are often home-based and not registered and therefore difficult to be measured through conventional labour force or establishment surveys.
- Finally, ways of classifications and data compilation and analysis on occupations and wages do not adequately reflect differentials between women and men.

Measurement of Poverty and Access to Resources

The persistent burden of poverty on women and the inequality in women's and men's access to economic structures and resources have been recognized as major obstacles to the full empowerment of women and to sustainable development in countries.

Although some definitions of poverty have been discussed and suggestions provided on the calculation of the poverty line by international agencies (for instance, the World Bank and OECD), there are in practice no standard methods for the measurement of gender differentials in poverty.

Poverty is determined not only by a low level of income and productive resources, but also by the lack of access to social services – such as housing, education and health care. Methods and criteria for the measurement of poverty should therefore be based on all these dimensions and consider different concepts of poverty to be applied to countries with a different level of development. In order to assess the different extent to which women and men are affected by poverty, data collection and analysis should focus on individual access to social services and intra-household food and resource allocation.

Measurement of poverty should focus on both economic and social conditions.

Household Data and Gender Roles in the Household

The traditional approach of studying households' characteristics through the household head is inadequate to understand household typologies, intra-household resource allocation, living arrangements and women's and men's roles within the household.

The number of dependent children, the presence of different generations or of more than one family nucleus and all other characteristics and living arrangements largely affect people's living conditions and need to be considered in data collection and analysis. Also, members of the same household have different socio-economic characteristics and may not equally share resources and responsibilities.

Make women's and men's sharing of responsibilities and resources visible on equal terms in statistics on various types of household.

A first step in the development of a full understanding of household characteristics is to study household composition on the basis of the number, sex, age and relationships of the members, along with other socio-economic aspects. Also, family relationships outside the household – such as children living apart from their biological parents – should be considered.

Give priority to data on women's and men's morbidity and access to health care.

Moreover, indicators on women's and men's roles within the household and on sharing of responsibilities may be derived from time use surveys. These data allow the analysis of gender roles within the family and a study of how these change with age and family composition, with the type of employment, and with other socio-economic characteristics of individuals.

Morbidity and Access to Health Services

Data on gender differentials in morbidity and causes of mortality are very scarce and seriously limit research and policy formulation in these areas. The paucity of data on these topics is mainly due to poor vital statistical systems in many countries and to a traditional approach in research design that has not given priority to gender differentials, although these are essentials in these areas especially because they involve both biological and social differences.

Violence Against Women

Violence in all its forms is very difficult to quantify and measure. However, domestic violence and violence against women appear to be the most unreported crimes. And even when violence is reported, ways of recording data are very often inefficient. For example, the relationship between the victim and the perpetrator is generally not reported, making it impossible to distinguish intimate assaults from those perpetrated by a stranger.

Collection of information through surveys is also very complex, since people are very reluctant to talk about violence they have suffered, especially when this is inflicted by a family member. The quality of the information collected varies significantly with the way the question is formulated, the level of training of the interviewer and the presence of other family members during the interview.

What Needs to be Done

As identified by the Beijing Platform for Action and by a number of other international conferences in the recent years, gender analysis and the mainstreaming of a gender perspective are indispensable in policy development and in the implementation of programmes.

The main needs for the improvement of gender statistics are as follows:

- Make the whole official statistical system gender-sensitive. A gender perspective should be integrated in all traditional statistical fields. All producers of statistics should be sensitised to gender issues.

Mainstreaming of a gender perspective in all policy areas requires a gender-sensitive official statistical system.

- Ensure that statistics related to individuals are collected, compiled, analysed and presented by sex and age, and reflect problems, issues and questions related to women and men in society
- Ensure the regular production of a gender statistics publication suitable for a wide range of non-technical users and prepare statistical outputs that integrate statistics from various fields.
- Ensure that users and producers of statistics regularly review the adequacy of the official statistical system and its coverage of gender issues, and prepare a plan for needed improvements, where necessary.
- Produce regularly at the national level a basic set of gender-sensitive social and economic statistics and indicators for international comparisons covering statistics on population and household, health, education, time-use, childcare, gainful employment, wage, salary and income, violence and crime, and power and influence.
- Ensure the adoption by countries of international standards and definitions and a wider dissemination of existing guidelines and manuals for the improvement of data collection.
- Develop new guidelines on the collection, compilation and analysis of data on morbidity, household characteristics, violence and other social topics where serious gaps have been identified.
- Ensure international co-operation to assist national statistical offices, through training and technical advice, in the improvement of data collection on women's and men's work. This implies introducing new types of surveys or revising existing data collection instruments to cover time-use, unpaid work, the informal sector, home-based work, family labour, unemployment, salaries and wages.
- Develop methods for the valuation of unpaid work within the System of National Accounts and for the assessment of the contribution of the informal sector to the total production.
- Promote research in the area of measurement of poverty and analysis of gender differentials in poverty, including the study of intra-household resource allocation.
- Ensure assistance to national statistical offices to improve data on household characteristics and gender roles and provide international guidelines for data collection, compilation and analysis in this area.

Progress will require close and continuous contact between data users and producers of statistics.

Methods for the valuation of unpaid work should be developed.

Summary

Improvement of statistics is still needed in a number of areas, especially those identified by policy makers at the national and international levels as crucial in the achievement of sustainable development. This paper discusses the challenges that gender statisticians face today in the development of a gender-sensitive statistical system.

The area where changes are most urgently needed is the measurement of women's and men's work and working conditions – especially those forms of work that do not fall within the conventional schemes generally adopted in countries when work is seen as formal paid employment. Important as a basis for formulation and monitoring of policies is also the assessment of the actual contribution of unpaid work and informal work to the national product, for which guidelines are needed. Other important areas are poverty and access to resources, vital and morbidity statistics, household data and gender roles within the family, and violence.

Biographical Notes of Speakers

Chairperson for Thursday

Florence Ievers
Co-ordinator, Status of Women Canada

Florence Ievers is the Co-ordinator of Status of Women Canada, the federal government agency which promotes the equality of women.

Ms. Ievers has had a diverse career at the federal and provincial levels as well as in the private sector. Her previous experience includes working as a lawyer in Quebec City; briefly as Secretary and Legal Counsel with the Advisory Council on the Status of Women; Associate Chief of Staff to the Minister of International Relations and Canadian Intergovernmental Affairs, Government of Quebec; and Assistant Secretary, Intergovernmental Affairs in the Privy Council Office of Canada. She has served as Executive Assistant to the President of the Treasury Board. For a number of years, Ms. Ievers served as a part-time member of the Canadian Advisory Council on the Status of Women, as well as a member of its Executive. She has served on the boards of a number of cultural and community organizations, including the Somerset West Community Health Centre and Laval University.

Speakers at the Welcoming Plenary Session

The Honourable Hedy Fry, P.C., M.P.
Secretary of State (Multiculturalism) (Status of Women)

Hedy Fry, a native of Trinidad and a medical practitioner, was first elected as the Member of Parliament for Vancouver Centre in 1993, and appointed Secretary of State (Multiculturalism) (Status of Women) in 1996.

Dr. Fry's deep concern for the welfare of the community has been reflected in her involvement in various areas of the medical profession where she occupied such positions as president of the B.C. Federation of Medical Women (1977). She was president of the Vancouver Medical Association in 1988-89, and of the British Columbia Medical Association in 1990-91, and chaired the Canadian Medical Association's Multiculturalism Committee in 1992-93. She obtained her medical degree from the Royal College of Surgeons in Dublin, Ireland.

Mel Cappe
Deputy Minister/Chairperson
Human Resources Development Canada

Mel Cappe became Deputy Minister, Human Resources Development Canada and concurrently Chairperson, Canada Employment Insurance Commission and Deputy Minister of Labour on July 2, 1996.

Mr. Cappe joined the Public Service of Canada in 1975 and held economic and policy positions in the Treasury Board Secretariat and the Department of Finance before joining Consumer and Corporate Affairs as Deputy Director of Investigation and Research in 1982. He later held the positions of Assistant Deputy Minister, Competition Policy; Assistant Deputy Minister, Policy Co-ordination, and Assistant Deputy Minister, Corporate Affairs and Legislative Policy in that department. He returned to the Treasury Board Secretariat in January 1990 as Senior Assistant Secretary and was appointed Deputy Secretary, Program Branch, in April 1990. Mr. Cappe was appointed Deputy Minister of Environment Canada on May 9, 1994.

Born in 1948, Mr. Cappe has a Masters degree in Economics from the University of Western Ontario and did doctoral work at the University of Toronto.

Ivan P. Fellegi
Chief Statistician of Canada
Statistics Canada

Ivan Fellegi was appointed Chief Statistician of Canada in 1985 and has been leading since that time what is ranked by *The Economist* as the best statistical office in the world. He has served the Agency since 1957 in positions of increasing responsibility. He has chaired the Conference of European Statisticians of the United Nations Economic Commission for Europe (ECE) (1993-97). He has been President of a number of statistical bodies including the International Statistical Institute, the International Association of Survey Statisticians, and the Statistical Society of Canada. In 1978 he was seconded to the Commission on the Reorganization of the US Statistical System, established by President Carter. He has been the Chairman of the Board of Governors of Carleton University (1995-97), which conferred upon him its first Ph.D. in 1961, and is Vice Chairman of the Board of the Canadian Institute of Health Information. Dr. Fellegi holds the Order of Canada, La Médaille de la ville de Paris, an Honorary Doctorate of Law from Simon Fraser University and an Honorary Doctorate of Law from McMaster University. He is an Honorary Member

of the International Statistical Institute and an Honorary Fellow of the Royal Statistical Society. Also in 1997, he was awarded the Gold Medal by the Statistical Society of Canada and awarded the Robert Schuman medal by the European Community. He has published extensively on statistical methods, on the social and economic applications of statistics and on the successful management of statistical agencies.

Keynote Speakers

Jane Friesen

Associate Professor of Economics
Simon Fraser University

Jane Friesen is an Associate Professor of Economics at Simon Fraser University. Her research interests include the effect of labour market policy on labour market outcomes, the determinants of work schedules, and the role of women in the labour market. Her most recent publications measure the impact of advance notice and severance laws on the Canadian labour market and examine the role of part-time work in firms' adjustment strategies. She is currently engaged in research examining the effects of Employment Insurance, overtime pay regulation and minimum wages on various aspects of the labour market.

Monica Townson

Monica Townson Associates Inc.

Monica Townson is an independent economic consultant working in the field of social policy. She has spoken and written extensively on the economic situation of women, as well as on issues relating to retirement and pension policy. She has been a consultant to the United Nations Economic Commission for Europe on the economic role of women and has participated in international seminars as an expert on both pensions and parental leave. She chaired the Ontario Fair Tax Commission, which reported in December 1993 with recommendations on tax reform for the province. And she is currently the Chair of Statistics Canada's Advisory Committee on Social Conditions.

Margaret Dechman

Nova Scotia Advisory Council on the Status of Women

Margaret Dechman is a researcher with the Nova Scotia Advisory Council on the Status of Women. She has worked for the Nova Scotia government

for many years in positions that have provided substantial experience with interdepartmental and multidisciplinary committees on women's issues. Prior to coming to the provincial government, Margaret worked as a research associate with the Institute for the Study of Women at Mount Saint Vincent University. Her research background is varied including issues such as family structure and child development, technological change, and employment equity. Margaret is currently co-ordinating the follow-up of a twenty-year longitudinal study focusing on outcomes for mothers and their children within both one- and two-parent families.

Major Address

Birgitta Hedman
Head, Gender Statistics
Statistics Sweden

Birgitta Hedman is Head, Gender Statistics, Statistics Sweden. Formerly, she was Officer and Deputy Head, Unit for Statistical Methods 1965-1976, and later Head of this Unit 1980-1983. Birgitta was a member of the United Nations Statistical Division, New York UN/DTCD, and a Technical Adviser on Statistics on Women in Development 1990-1991. She is Sida Gender statistics consultant in Africa, Asia, Latin America and Eastern Europe 1985- . She has a Ph.D. in Statistics, University of Uppsala, and taught statistics during 1960-1967.

Chairperson for Friday

Hélène Dwyer-Renaud
Director, Women's Bureau
Strategy and Coordination Directorate, Strategic Policy Branch
Human Resources Development Canada

Hélène Dwyer-Renaud is Director of the Women's Bureau, in the department of Human Resources Development Canada. Ms. Dwyer-Renaud has been involved in gender issues for almost twenty years, both in government and community settings. Her extensive experience covers a wide range of areas including women's health, violence against women and women's economic equality.

Ms. Dwyer-Renaud has occupied various positions in policy analysis and development, research, liaison and coordination, contributing to the design

of major Canadian government initiatives pertaining to women's equality such as the Federal Plan on Gender Equality, the government's Gender-Based Analysis Policy, and the Family Violence Initiatives.

Ms. Dywer-Renaud holds a Masters degree in Social Work with a specialization in Social Policy Administration from Carleton University, and a Bachelor of Social Sciences with an Honours in Sociology from Ottawa University.

Major Address

Selim Jahan
Deputy Director
Human Development Report Office
United Nations Development Programme

Selim Jahan is currently Deputy Director, Human Development Report Office, UNDP, New York. Member of the Core Human Development Report Team which has written the Report since 1992. Formerly, Professor of Economics, University of Dhaka, Bangladesh and Visiting Fellow, University of Cambridge, UK, and University of Maryland, USA and Economic Adviser, Ministry of Planning, Government of Bangladesh. He has a Ph.D. in Economics from McGill University, Canada and is the author of 8 books and more than 150 research papers and articles on various issues of Development Economics. His areas of current research include: poverty, employment, human security, sustainable human development.

Biographical Notes of Workshop Leaders

Workshops I and V

Theme: Gender equality indicators and gender-based analysis –

Gender equality indicators serve many users: public policy-makers, interest groups with a stake in broad public issues and those who develop outcome-oriented social and economic indicators. How can available gender equality indicators be used to stimulate more effective use of the principles of gender-based analysis in public policy-making?

Workshop I

Chairperson

Isabella Bakker
Professor
York University

Isabella Bakker teaches at York University, Toronto, Canada. Her research interests span several areas including gender and macroeconomics, state finance, and changing state forms. Isabella Bakker has published two edited volumes on gender and restructuring (*The Strategic Silence: Gender and Economic Policy*; *Rethinking Restructuring*) as well as numerous articles on the gender aspects of fiscal policy. She has also maintained an involvement with NGOs and international agencies, writing and lecturing internationally on engendering economic policy and alternative women's budgets. She has been involved in a variety of consultation projects with such diverse organizations as the North-South Institute and the Canadian International Development Agency (both in Ottawa), Status of Women Canada, and the United Nations Development Program in New York.

Rapporteur

Sheila Regehr
Economic Policy Coordinator
Policy Analysis and Development Directorate
Status of Women Canada

Workshop V

Chairperson

Zeynep Karman
Director, Research
Status of Women Canada

Rapporteur

Meg Luxton
Professor
York University

Meg Luxton is Professor of Social Science and Women's Studies at York University. She is the author of several books on women's unpaid work in the home. The most recent (with June Corman) is *Getting By in Hard Times: Restructuring Gender and Class in Hamilton, Ontario, 1980-1996*.

Workshop II

Theme: Paradigms implicit in social and economic indicators –

Various federal projects are now under way to develop social and economic indicators. In what major areas do their underlying assumptions or paradigms about major policy-relevant social and economic variables and their causal linkages diverge or overlap? What opportunities exist to achieve improved “rapprochement” among these projects after their divergences are considered?

Chairperson

Michael C. McCracken
Chair and CEO
Informetrica Limited

Mike McCracken is one of the founders of Informetrica Limited, a Canadian-based economic research and information company, providing long-term national, provincial, and industrial forecasts to companies, governments, and other organizations across Canada and abroad.

He has served as president of the Canadian Association for Business Economics (1979-81 and 1988-90) and Chair of the US Conference of Business Economists (1994). He is Treasurer of The Canadian Employment Research Forum (CERF) and a member of the National Accounts Advisory Committee at Statistics Canada.

Rapporteur

Margaret Moyston-Cumming
Health Policy Division
Health Policy and Information Directorate
Health Canada

Workshop III

Theme: "Best practices" for developing, dissemination, and using gender equality indicators (GEI) – What are some of the “best practices” used in Canada, selected countries and international organizations for developing, disseminating and using gender equality indicators to support deliberations and work in the private and public sectors, and what barriers impede progress toward improved practices?

Chairperson

Hélène Massé
Associate Director General
Secretariat, Status of Women
Province of Quebec

Hélène Massé is the Associate Director General of the Secretariat of Status of Women for the province of Quebec. She received her Masters degree in Political Science from the University of Laval, and has worked for the past ten years for the government of Quebec to improve the living and working conditions of women. She coordinates the network of leaders for the Status of Women for more than thirty agencies and organizations. Madame Massé also coordinates the work that links the participation of the government of Quebec with the federal, provincial and territorial ministers of Status of Women as well as at meetings with senior public officials that are responsible for the Status of Women. Since September 1997, Madame Massé has been the co-director for the project “Implementation of gender-based analysis in governmental practices”.

Rapporteur

Marg Gorrie
Ontario Women's Directorate

Marg Gorrie works at the Ontario Women's Directorate as an economic policy analyst. Marg has a Masters degree in Health Sciences and has worked in the field of health care in nursing and policy. Her primary area of interest is women working in health care.

Workshop IV

Theme: Technical problems and data gaps for GEIs – What technical problems and data gaps impede efforts to produce and regularly update a set of comprehensive policy-relevant GEIs for Canada? To what extent can the gender dimension be better reflected in indicators beyond GEIs? What are the barriers?

Chairperson

Andrew S. Harvey
Professor of Economics
Director of the Time-use Research Program
Saint Mary's University and President of the International Association for Time use Research (IATUR)

Andrew S. Harvey (B.A., Maine; M.A. and Ph.D., Clark University) is Professor of Economics, Director of the Time-use Research Program at Saint Mary's University and President of the International Association for Time use Research (IATUR). Dr. Harvey's research interests cross several disciplines focusing particularly on the study of time-use and the definition, measurement and valuing of human activity. In 1971 he directed a time-space study DOMA (Dimensions of Metropolitan Activity). Since that time he has been heavily involved in the design, implementation and analysis of time use surveys. Dr. Harvey has served as a consultant to the FAO, the UN Statistical Office, UNDP, the World Bank, Statistics Canada and a number of other organisations. From 1992 to 1996 he co-ordinated a project on Time-use and the valuation on non-market production for UN INSTRAW. With funding from SSHRC, commencing in 1994 Dr. Harvey and several colleagues have been exploring the concept of activity settings. He is the author of numerous monographs and articles in a number of areas including time use methodology, social indicators, leisure studies, ageing, gender studies, urban and regional economics and planning, evaluative research, and secondary data analysis.

Rapporteur

Victor Ujimoto
Professor of Applied Sociology
University of Guelph

Victor Ujimoto is Professor of Applied Sociology, University of Guelph, and Adjunct Professor, University of Waterloo. His research interests are in social gerontology, ethnic studies, and at present, gender equality in the

airline industry. His work borrows heavily on the time-use methodology which was pioneered by Dr. Andrew Harvey, Saint Mary's University. Victor is an active member of the Social Indicators Research Group and the International Association of Time Use Research.

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